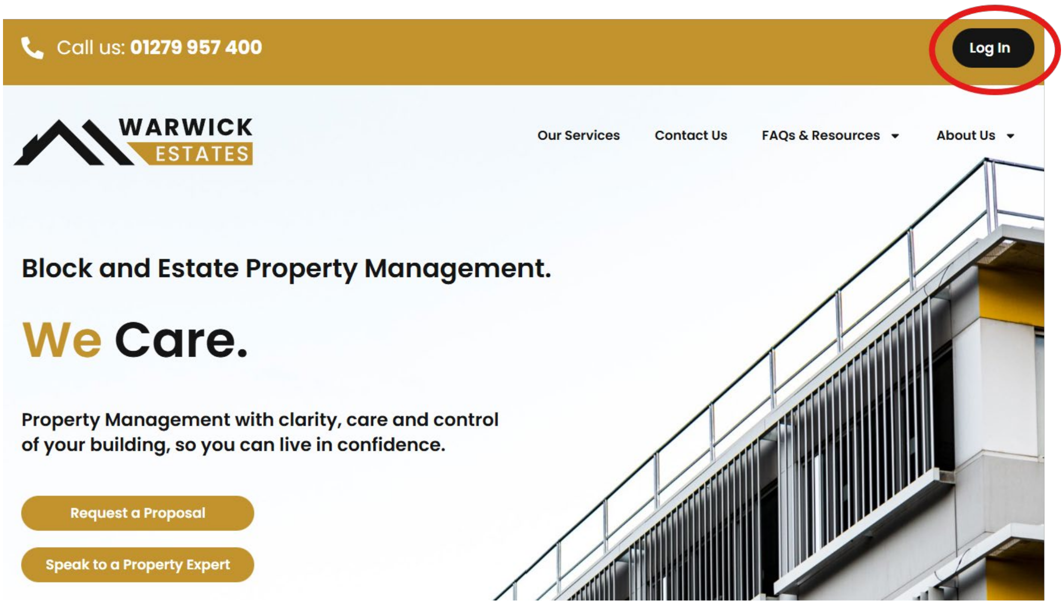
Director Portal Guide

A guide to our portal for our Director clients

Accessing the portal

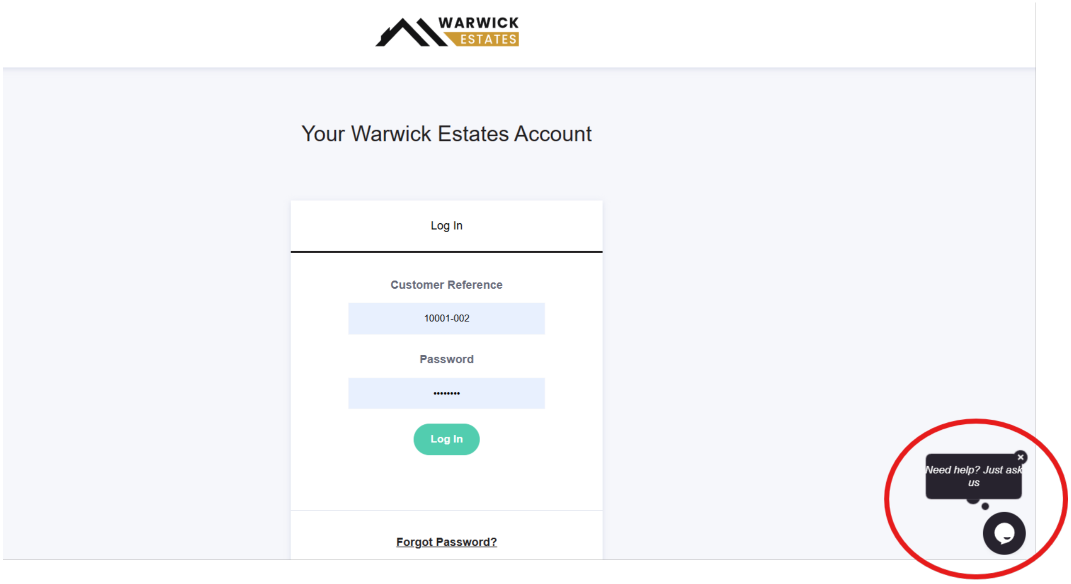
In order to access our customer portal simply head to www.we-pm.co.uk

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 customer 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.



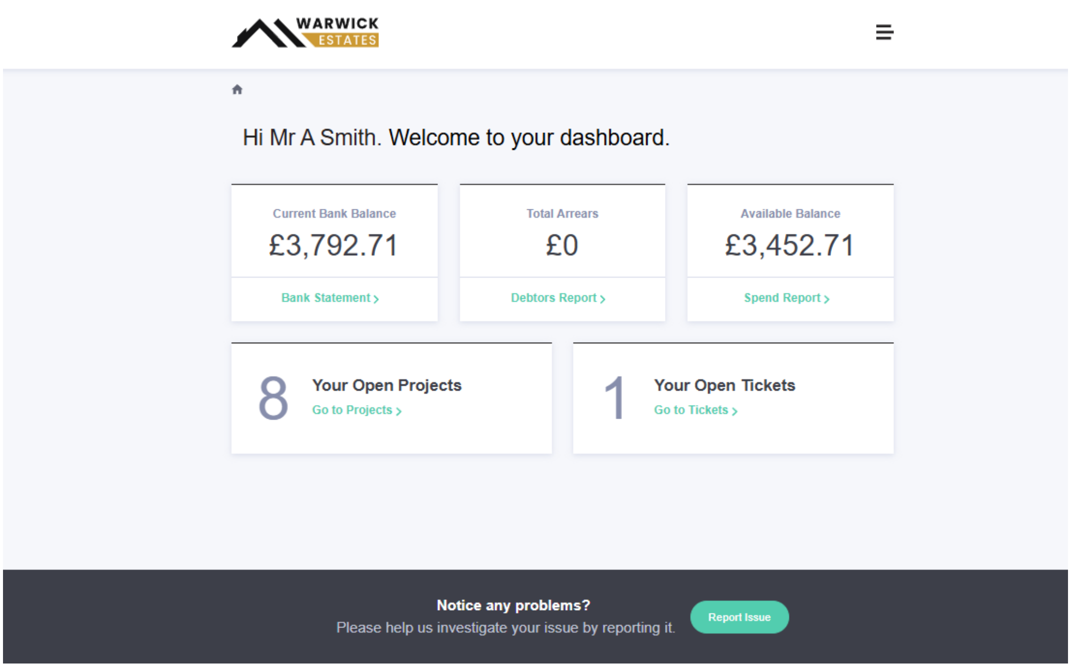
Note: *The Live Chat icon will remain at the bottom right of the screen should you need to raise a query or require any help whilst on your customer account.*

Dashboard

Once you have logged in, it will bring you to your dashboard where you can find the following specifically related to your development:

- Current Bank Balance - what is currently in the bank account
- Total Arrears - the total amount of money owed by residents
- Total Committed Funds - the amount of money that has been spent
- Available Balance - funds available to be sent
- Reserve Fund Balance - what is currently in the reserve fund account
- Budget Spent in the current budget year - how much of the annual budget has been spent to date
- Open Projects – details and discussions regarding live works projects
- Open Tickets – details of any open and on-going tickets relating to your development

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 Bank statement
- View Debtors report
- View Spend report
- Go to Projects
- Go to Tickets

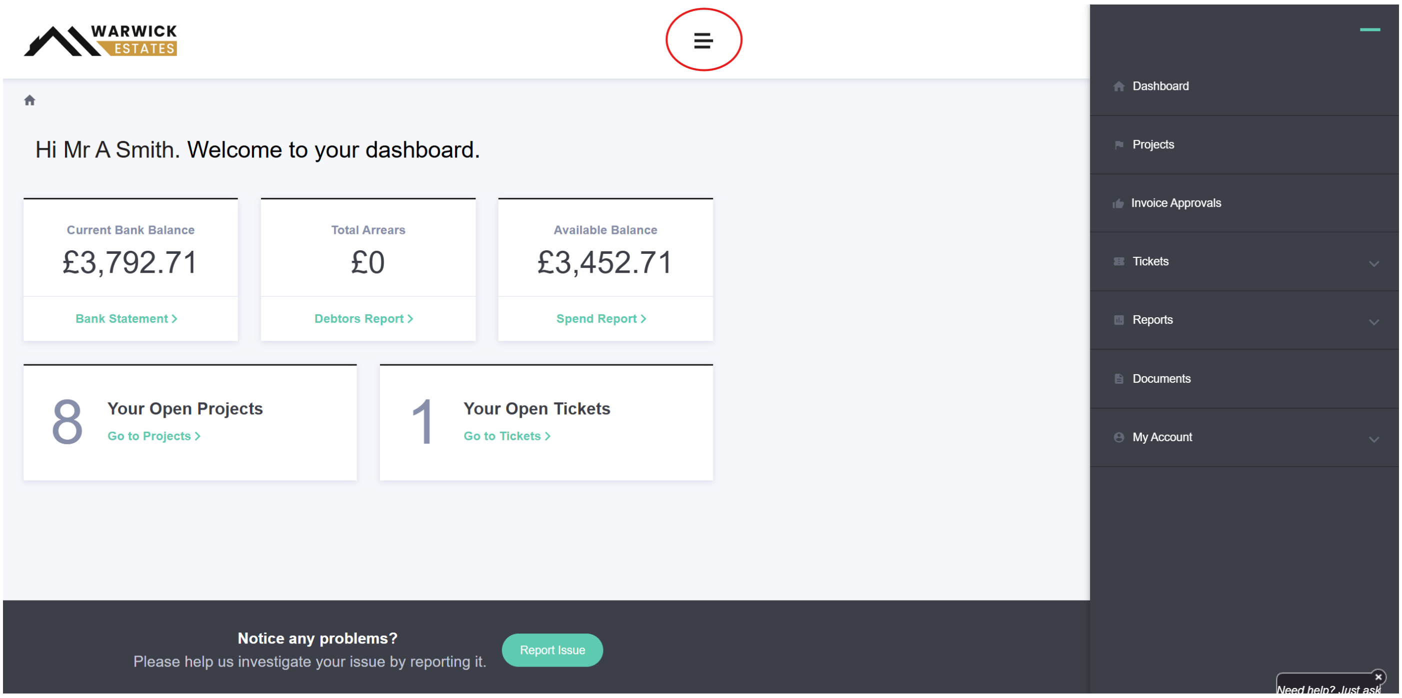
These options are explained in greater detail below.

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.



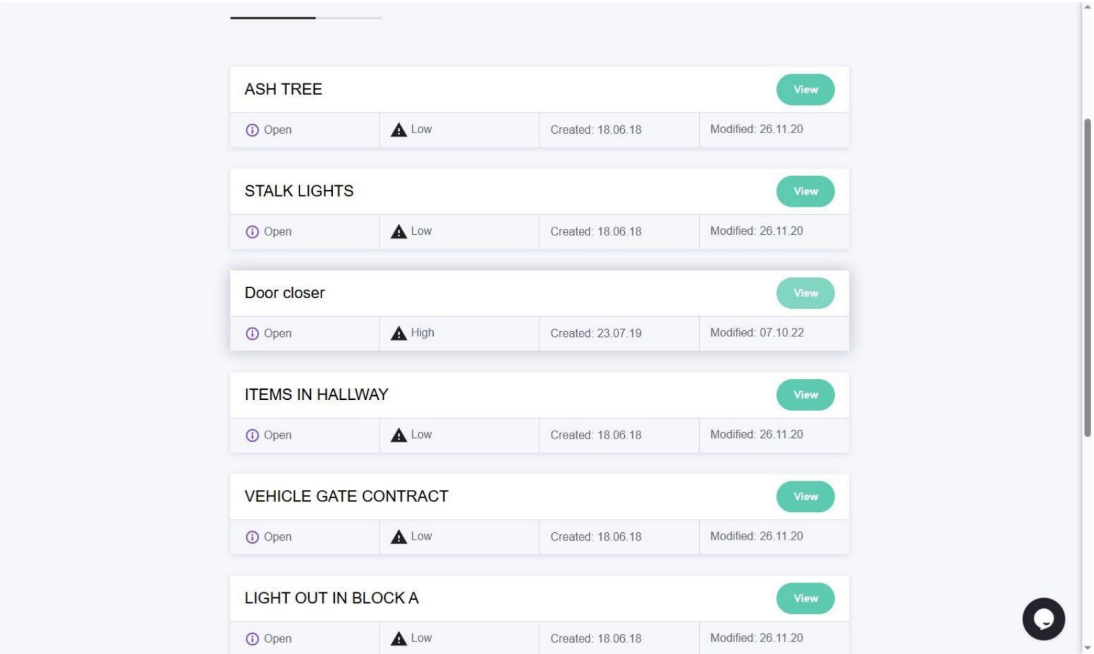
NOTE: *Dashboard takes you back to your main dashboard page (page 3).*

Don’t forget to Log Out of your account when you are done!

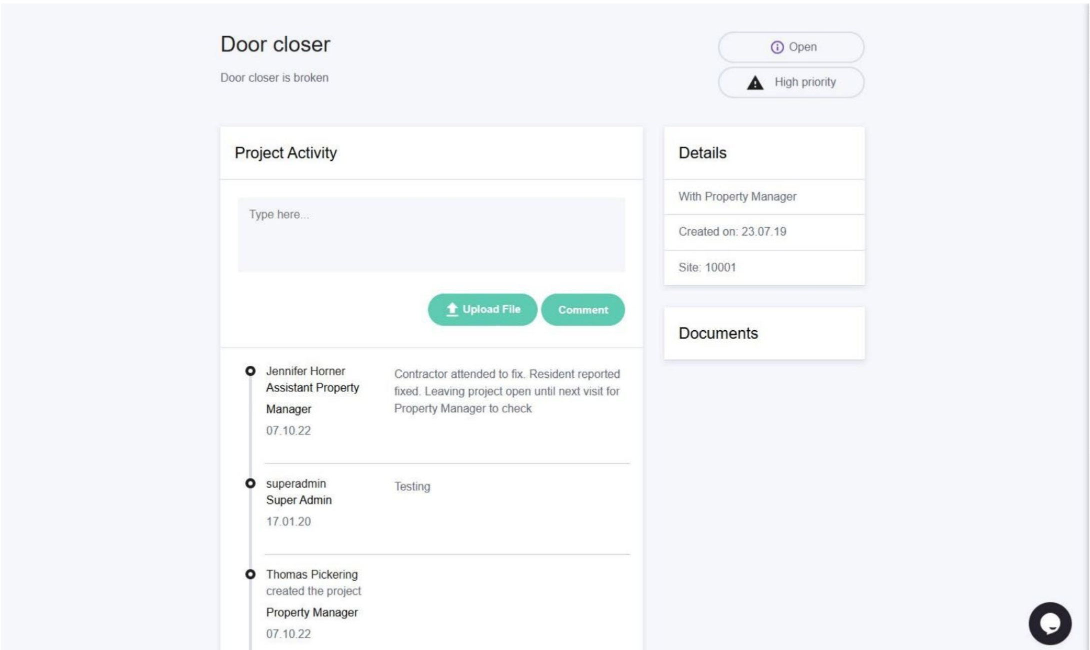
Projects

By clicking ‘Go to Projects’ on the dashboard, or ‘Projects’ on the menu bar, you will be able to see all open projects in respect of your property. At Warwick, we use a single 'Projects List' to keep track of all the projects we're working on for you.

A project is any piece of work that requires more than a couple of action steps to complete, regardless of how big or small.

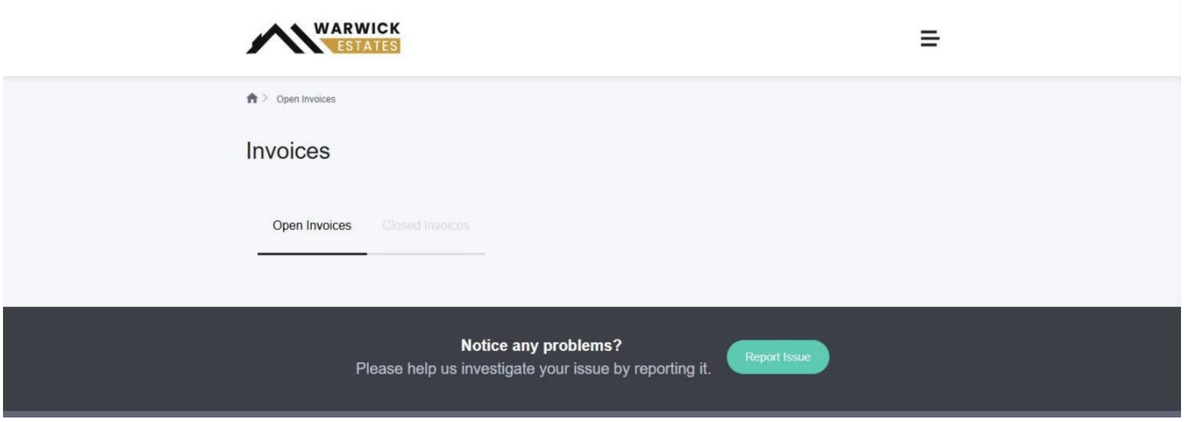


You also have the ability to ‘view’ each project, add a comment and upload a file.



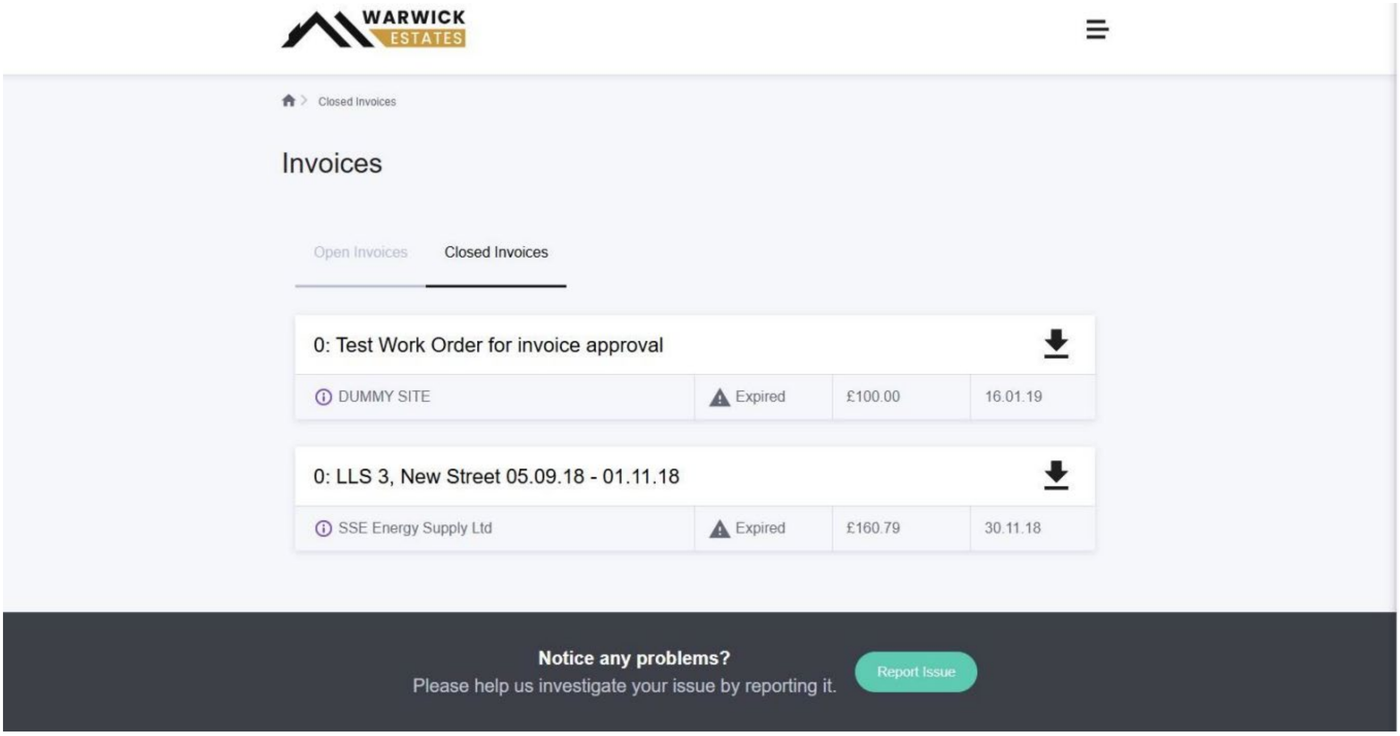
Invoice Approvals

Clicking on 'Invoice Approvals' on the menu bar, allows you to see all invoice that are currently waiting directors approval before we can send payment.



When an invoice requires approval by a director, it will appear under 'open invoices' for you to view and approve.

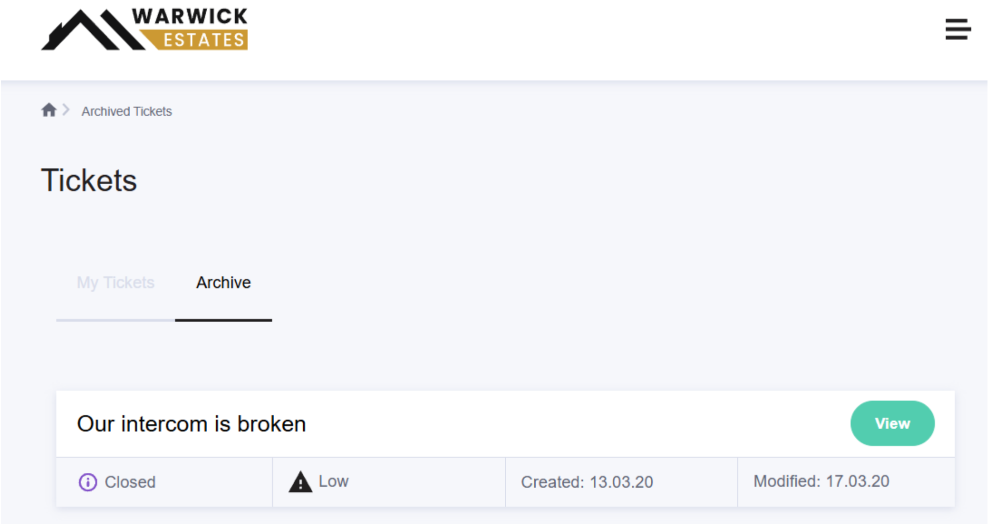
The closed invoices section allows you to view all paid invoices related to your development.



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.

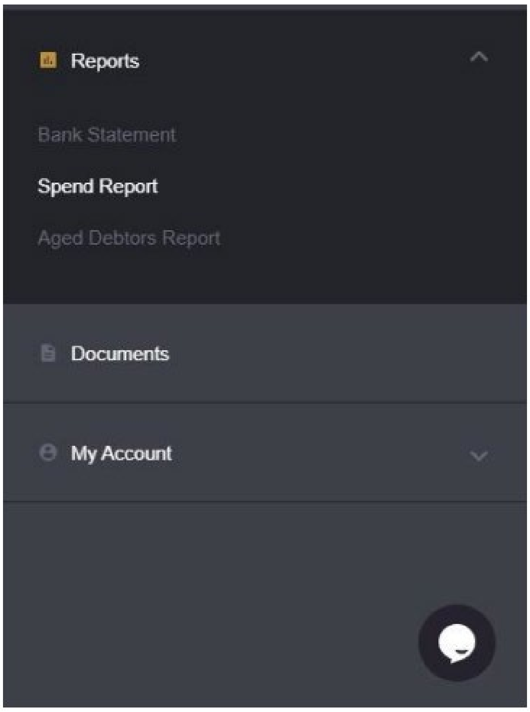
This system also allows you to see updates added by our team, so you are up to date with what is happening. These tickets will not be closed until the matter is resolved so you have complete transparency of information.



Directors can view all tickets relating to your development.

Reports

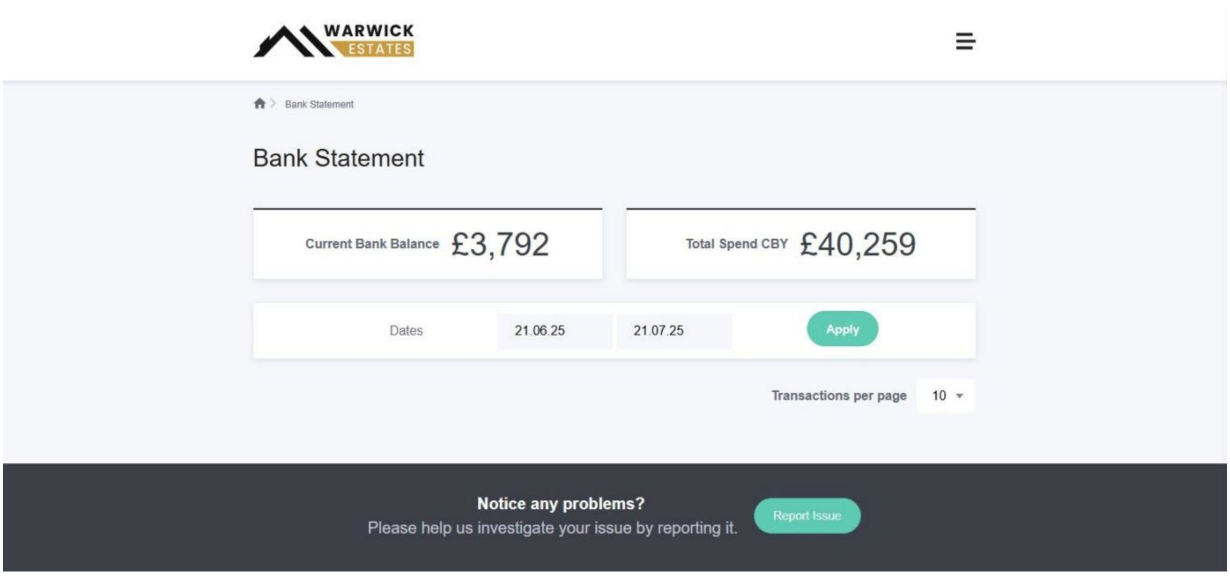
Clicking Reports on the menu bar will provide three further options:



Note: all three of these can be accessed from the dashboard too

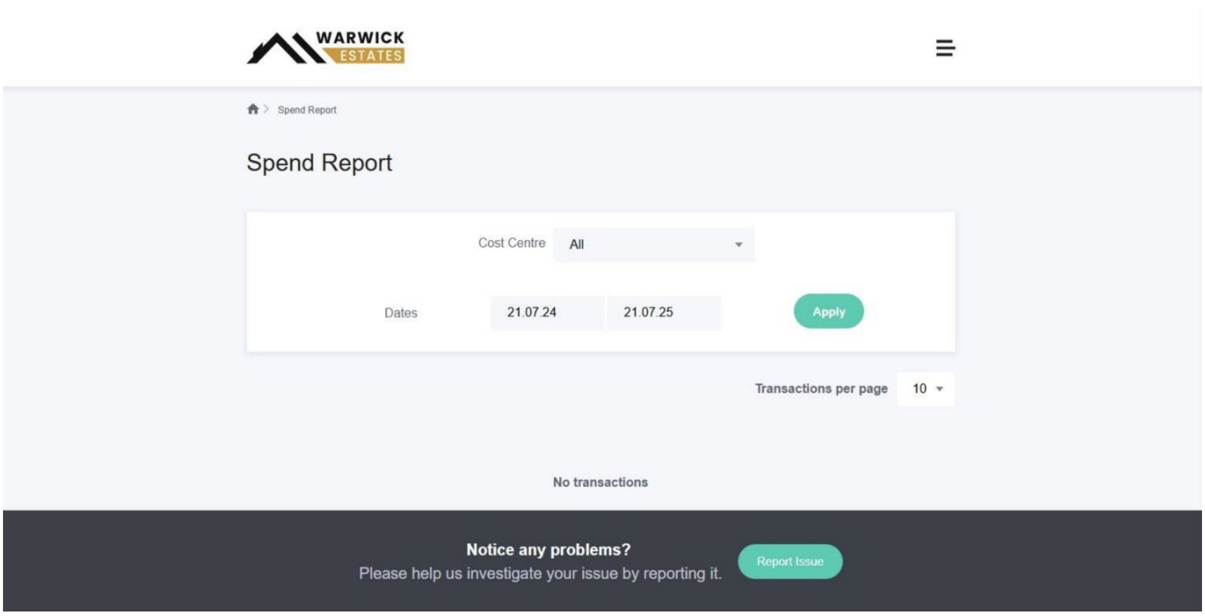
Bank Statement

View the sites current bank balance, alongside the total spend.



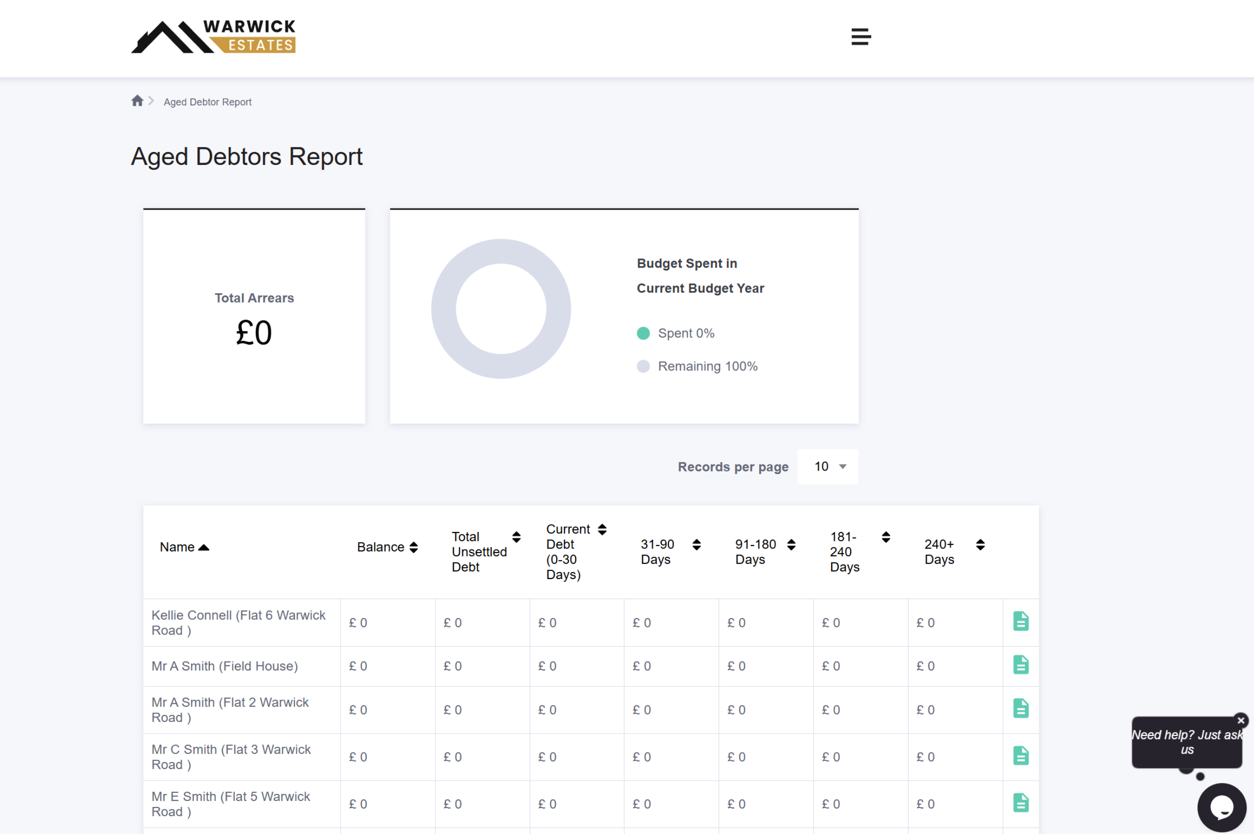
Spend Report

See what funds have been spent, using the filter to select items of interest and date ranges.



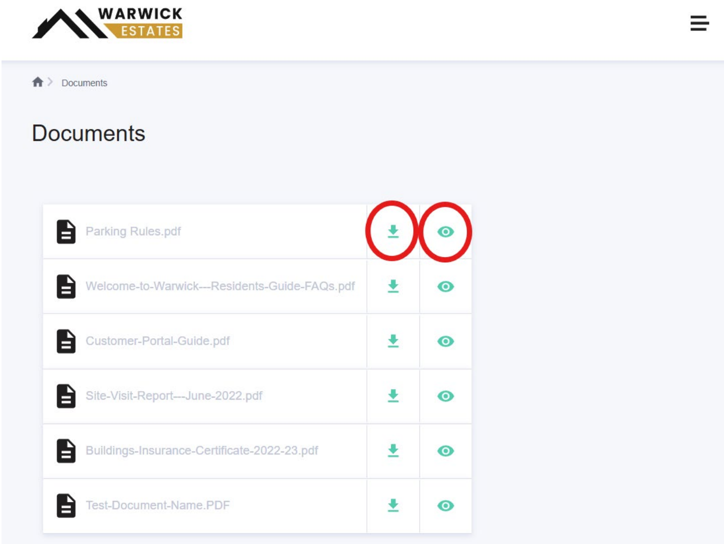
Aged Debtors Report

Here you can view how much of the budget has been spent in the current budget year, as well as the total arrears outstanding for the development.



Documents

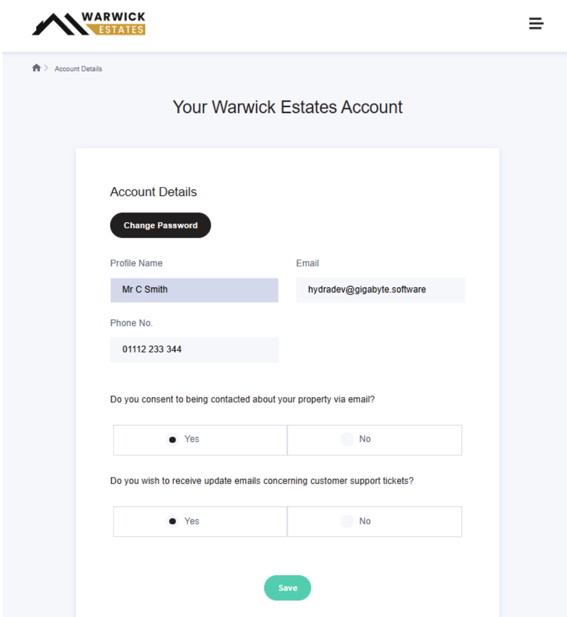
By selecting documents on the menu bar you will be able to see all of the documents linked to your property, such as buildings insurance, site visit reports and parking rules. You can view and download these at any point by selecting the below icons:



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.



Account Statement

By clicking 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.