

MULTIPLE PROPERTIES / CASE FILES UNDER ONE CENTRALIZED ACCOUNT

Assistance Connect now allows a user to access multiple properties or case files from one centralized account. This feature will especially benefit Property Owners with multiple properties. From a single account, the user will be able to quickly view and manage all of their properties and case files. Previously, a user would need to create a unique username and password for each one, resulting in a very cumbersome process.

To link a case file or property to an account, a user can use the “Add Property” (for Owners) or “Add Case File” (for Applicants and Tenant) option on the *My Account* page to register additional entities, as shown in Figure 2 below. These options will prompt the user for the required information (Tax ID and PIN for Owners; SSN, DOB, Last Name and PIN for Applicants and Tenants). Once completed, the user will now have access to the additional property or case file from within the existing account. Please note: The ability to merge existing accounts together does not yet exist but has been logged as a potential future enhancement.

The screenshot shows the 'My Account' page with the following details:

- Header: My Account, Last Sign In 08/29/2018
- Text: Please choose a property to access or add a property: [Add Property]
- Table with columns: Housing Agency, Name, User Type, Status, Notifications
- Table Row 1: HAPPY Housing Agency, HAPPY Properties, Property Owner, Active, Notifications: 5 Items need attention (5 Documents need to be signed, 5 Unread Documents (Inbox), 2 Unread Request Status Messages) [View]

Figure 2 - Owner My Account

When users with multiple case files or properties linked to a single account sign into the system, they will be able to choose which one they would like to access. The “Notifications” column, as shown in Figure 3 below, will help show which case files and properties need attention. For example, a document needing to be signed.

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- Text: Please choose a property to access or add a property: [Add Property]
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- Table Row 1: HAPPY Housing Agency, HAPPY Properties, Property Owner, Active, Notifications: 5 Items need attention (5 Documents need to be signed, 5 Unread Documents (Inbox), 2 Unread Request Status Messages) [View]
- Table Row 2: HAPPY Housing Agency, HAPPY Prop. Phase 2, Property Owner, Active, Notifications: None [View]
- Table Row 3: Sample Housing Authority, HAPPY Properties, Property Owner, Active, Notifications: None [View]

Figure 3 - Property/Case File Selection

OWNER CONTACTS

Owners will need to create a Contact record, on the *Manage Contacts* page, for any users they would like to invite to view and manage their property. Please note: An email address is required for this process.

Manage Contacts

Contacts can be created and maintained for use with listed rentals. Additionally, you can grant access to this property to a Contact by inviting them to create an Assistance Connect account. If your Contact has an email address, you can use the invite button to send the user an invitation to create an Assistance Connect account. The invitation will step them through establishing a username, password and security questions. If the email address was wrong or the Contact did not receive the invitation, you can reinvite them and the system will re-send the invitation.

Once the account is created, they will have full access to this property. Including access to any option on the menu bar such as the Inbox to view and sign documents, as well as the ability to submit requests. However, they will not be able to invite other users as this option is only available to the Primary account holder.

For oversight on this process, the Contact who creates a given request will now be tracked. For any new request, the Account Username will be displayed in the request details. Information on who signed a given document will also be tracked in the Inbox.

At any time, you can remove access to your property for a Contact by changing their associated status to Inactive. As well as the ability to revoke an invite, if an account has not yet been created.

Name	Username	E-mail	Phone	Last Sign In	Status	
John Smith	happysub1	john@happyproperties.com	(518) 584-4668	08/28/2018 8:13 PM	Active	
Mark Young	happysub2	Mark@happyproperties.com	(518) 584-4668	08/29/2018 12:44 PM	Active	
Gary Davis		Gary@happyproperties.com	(518) 584-4668		Invite	
Jane Williams		Jane@happyproperties.com	(518) 584-4668		Invite	

[Add Contact](#)

Figure 5 - Owner Manage Contacts

Once the Contact has been created, simply click the Invite button and confirm the invitation.

Are you sure you want to invite Gary Davis?

Once invited, this contact will have access to your property.

[OK](#) [Cancel](#)

Figure 6 - Invitation Message