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Tenant Portal Case Study with Sage Timberline Office

Abstract

In its simplest form, a Tenant Portal is a self-care website that allows tenants to access information and services related to their lease. Reduction of costs and improved customer service are core benefits of a Tenant Portal. In January of 2009, eTenantCare became a Sage Timberline Development Partner. The integration was completed in March of 2009.

Introduction

In a changing economic climate that is affecting energy costs, labor/material costs and vacancies rates, recent technology trends, in an effort to combat these issues, include the implementation of the Tenant Portal. This study’s focus is on the deployment and operation of a Tenant Portal at a Sage Timberline Office customer.

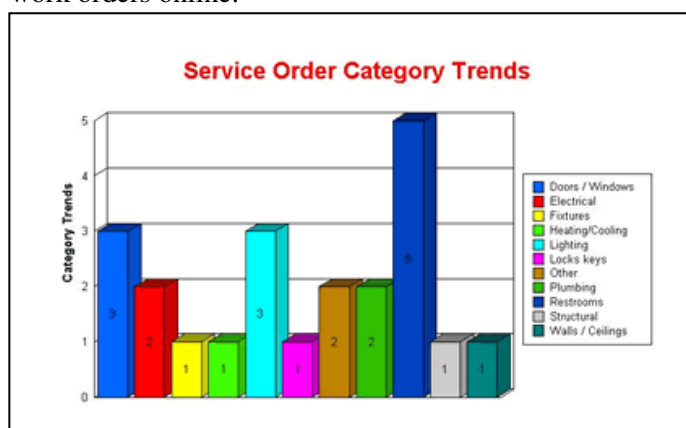
Subject Customer

The subject customer develops and manages commercial properties in the mid-west. The Tenant Portal represents a single physical property consisting of approximately 120 tenants. The Tenant Portal was deployed in May of 2009. This study details the findings from the deployment and operation of the Tenant Portal and it’s interaction with Sage Timberline Office.

Tenant Portal Options Deployed

The following modules are in use in the subject deployment:

1. Online web based work order system – allows tenants to create, update and check statuses of work orders online.



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- Online Payments – allows tenants to pay rent online using credit cards/debit cards or PayPal. Users are charged a 3.1% convenience fee.

Company Name	Tenant ID	Property Name	Suite
*****	*****	*****	*****
Over Amount	Tenant Payment	Payment Fee	Misc Income
\$670.15	\$640.30	\$19.73	\$1.04
\$670.15	\$640.30	\$19.73	\$1.04
\$690.77	\$669.36	\$20.33	\$1.08
Company Totals	1,968.11	\$59.79	\$3.17
\$1,971.28			
Company Name	Tenant ID	Property Name	Suite
*****	*****	*****	*****
Over Amount	Tenant Payment	Payment Fee	Misc Income
\$1,675.30	\$1,623.44	\$48.09	\$3.05
\$670.15	\$640.30	\$19.73	\$1.04
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\$670.15	\$640.30	\$19.73	\$1.04
Company Totals	6,169.87	\$187.80	\$10.36
\$6,179.63			
Report Totals:			
Total Over	Total Payments	Total Fee	Total Misc Income
\$62,553.43	\$60,614.27	\$1,839.56	\$99.60
			Total Collected
			\$60,713.87

- Online Invoices and Statements – allows tenant to view and print invoices/statements online with up to 12 months of historical invoices/statement.

Online Statement

OPEN ITEM STATEMENT

Date: 03/01/2010
Account: *****
Amount enclosed: _____

Please enclose this portion with your remittance.

Please make checks payable to: *****

Statement for: *****
Statement Date: 03/01/2010

Unit	Date Due	Description	Amount
1203A	11/25/2009	Late Charge	\$85.00
1203A	03/01/2010	Rent 1203 Row Bldg 1	\$850.00
			Balance: \$715.00

- Online News and Announcements – allows tenants to access and view property news and announcements online and thru email.
- Online Documents and Forms – allows tenants to access property specific and unit/suite specific documents online.

Downloadable Forms

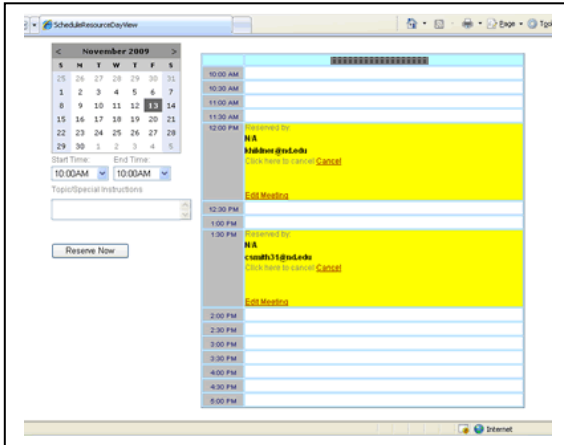
Property Documents

Document Name	View Document
Lease Part 1	View
Lease Part 2	View
Lease Part 3	View
Rules and Regulations	View
Fees and Fines	View
Emergency Numbers	View
Athletic Waiver	View
Vehicle Registration	View
Tanning Registration	View
Appliance Instructions	View

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- 6. Online reservations of common facilities and resources – allows tenants to reserve common facilities and resources online.



Study Parameters

This study looks at four parameters to calculate benefits. They are:

- Material and labor savings through the elimination of the traditional method of distributing paper memos and handouts. Savings figure is based upon an industry average of .50 per handout which includes labor and material costs.
- Labor savings through the use of an automated web based service request system. Savings based upon an industry average of \$1.50 per call which includes labor and material costs.
- Material and labor savings through the use of online payments and invoice/statement display. Includes elimination of postage, paper, ink, and labor to stuff envelopes. Savings is based upon .75 per tenant.
- Staffing labor savings through the general use of “Self Service” functions that normally require staff interaction. Savings is based upon a reduction in staffing at a rate of 20%. Staffing hourly rate of \$12.00 per hour for a full-time employee is used to calculate total staffing labor savings.

Documented Study Results

A total bottom line average savings of \$540.00 a month was achieved. This equates to an annual cost reduction of \$6,480.00 for a single property. The following averages were documented.

Item	Average Monthly Documented Savings/Revenue
Savings from elimination of Tenant handouts. (3 announcements on average a month)	\$120.00

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Savings with the introduction of automated service request system. (On average 1 new work order each business day)	\$30.00
Savings with the deployment of online invoices and payment options	\$90
Staff labor savings (based upon 20% staff reduction)	\$300.00
TOTAL Monthly Average Revenue Savings	\$540.00

Integration Benefits

The benefits of the integration with Sage Timberline Office include:

1. Initial and subsequent bulk loading of Timberline data into the Tenant Portal – Maintaining the data in the Tenant Portal can be simplified by bulk loading tenant data as needed to keep the two systems in synchronization.
2. Invoice and Statement loading – Loading invoices and statements into the Tenant Portal is a 5 minute process from start to finish (Tenant Invoice/Statement ready notification)
3. Payment and Charge Posting – Online Payments and Miscellaneous Charges are bulk imported into Timberline Office eliminating the need to manually post payments and enter charges.
4. Although the subject does not use Service Management, eTenantCare has integrated the online Work Order system with Service Management.