Return to contents

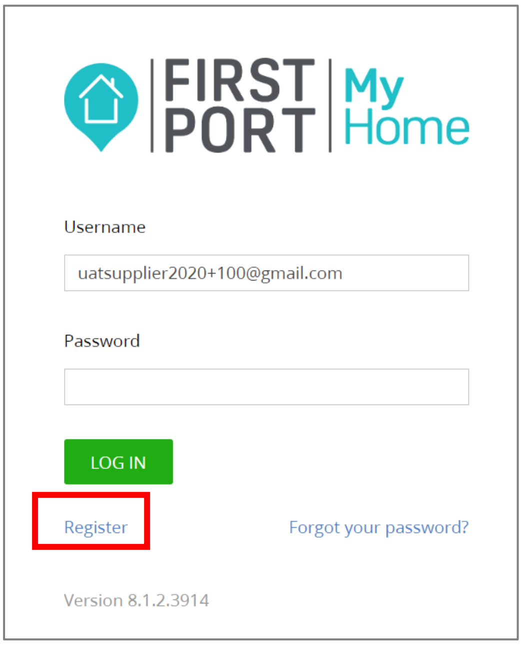
My Home Customer Portal - FAQs

Contents

Return to contents

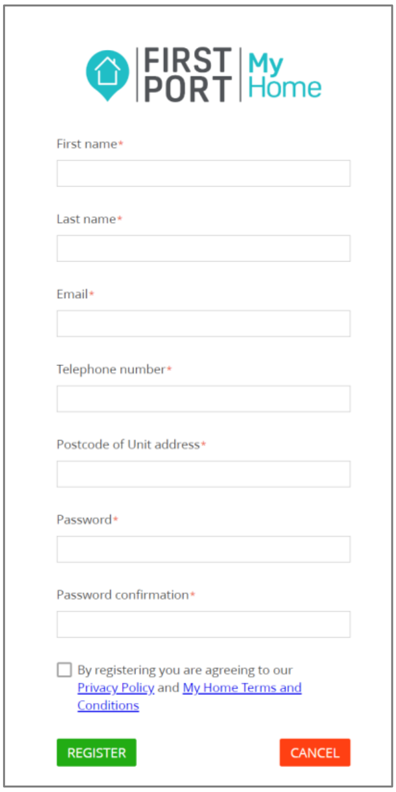
How Customers Register?

Go to website address and they will land on the home screen, then click **Register** as highlighted below.



The below registration pop up opens for the customer to complete.

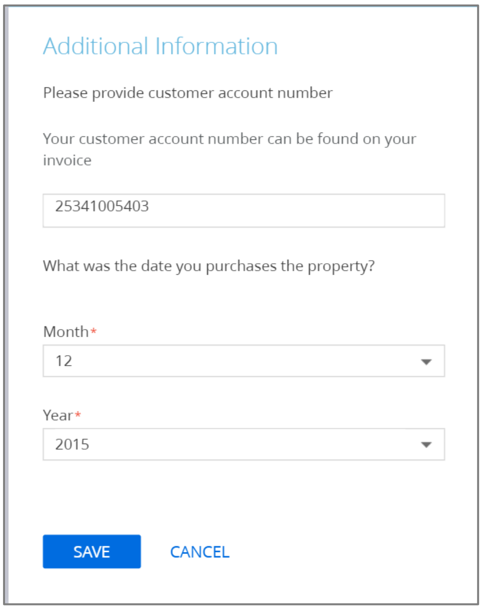
All mandatory fields need to be complete, system will check if **surname**, **email** & **Postcode of unit address** match what's on record, if they do the customer will be able to complete their registration and enter the portal.



Return to contents

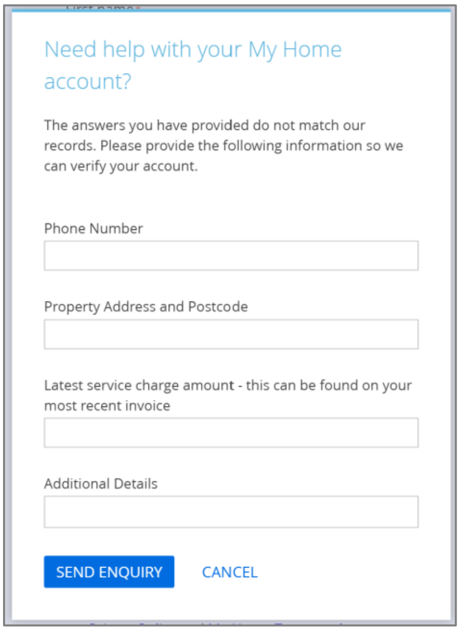
What to do if the system doesn't recognise the user details?

If any of the **surname**, **email** & **Postcode of unit address** details entered do not match what we hold, this pop up asks for Additional Information, the **Customer Account Number** & **Month & Year of purchase.** They need to click **Save** to progress.

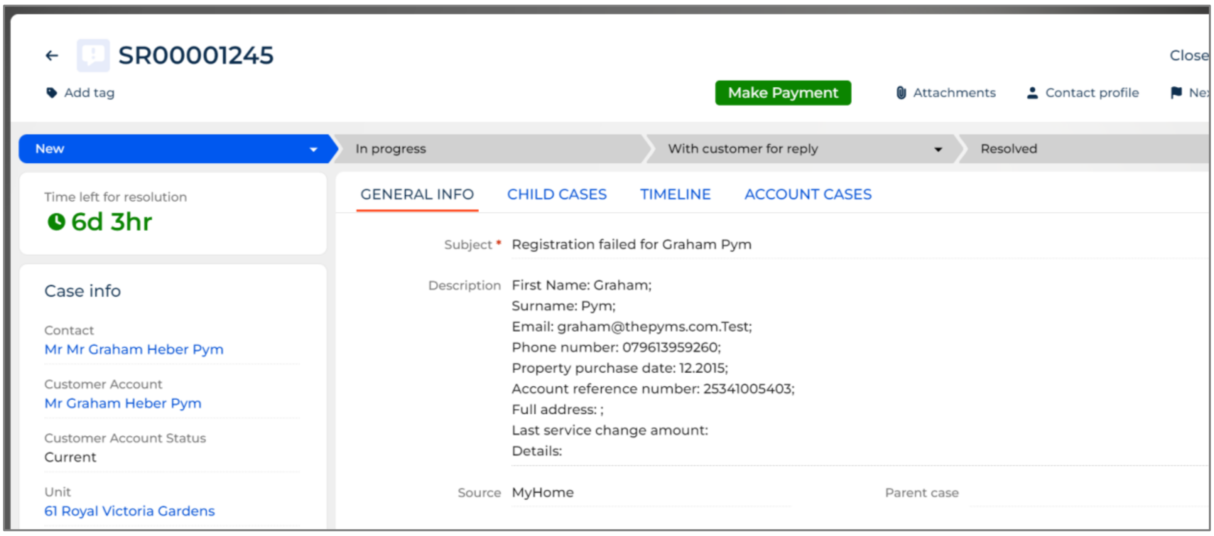


If there is not already a Unit Owner contact against the account, a contact will be created at this point, and the user will be able to complete their registration and enter the portal.

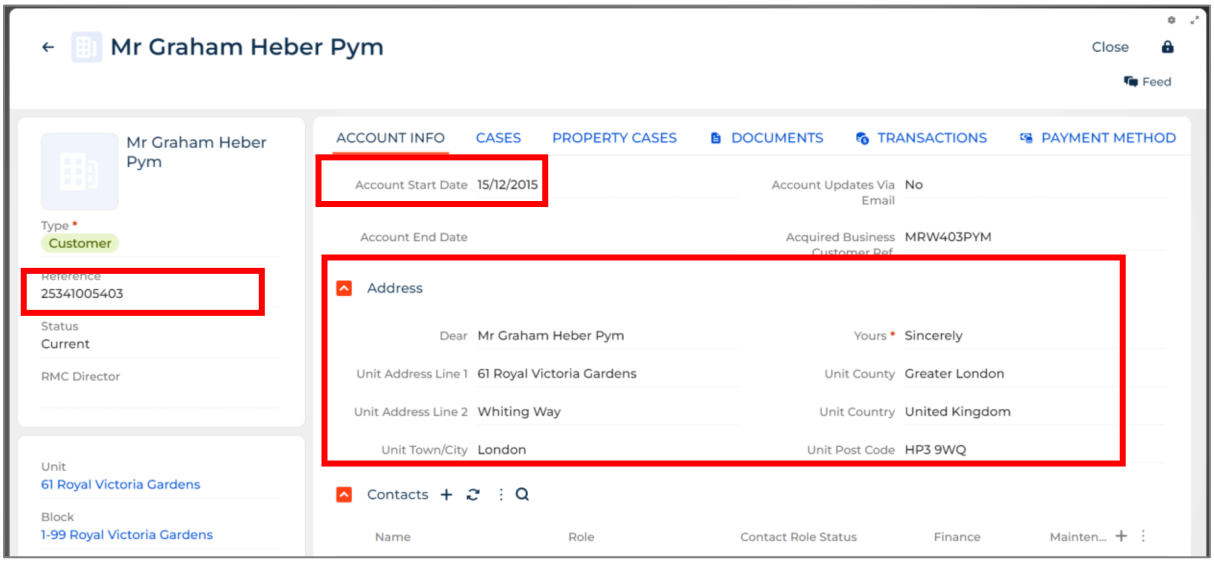
If there is already a Unit Owner contact against the Account, or the details the customer entered do not match again, a second pop up then asks the user to input further information, **Phone number, Property Address and Post Code, Latest Service Charge Amount, Additional Information.** None of these fields are mandatory. The information is used to create a case to help the operative identify the contact against the account. Clicking **Send Enquiry** then creates the case and returns the user to the login page.



Below is an example of a case created in the CRM with the details submitted from the enquiry. This information can then be assessed to validate the contact against the account or ask further questions for clarification.



Check the information provided in the case against the Customer account details to ensure it matches. The **Reference, Account start date & Address** are the key fields to check and highlighted below.



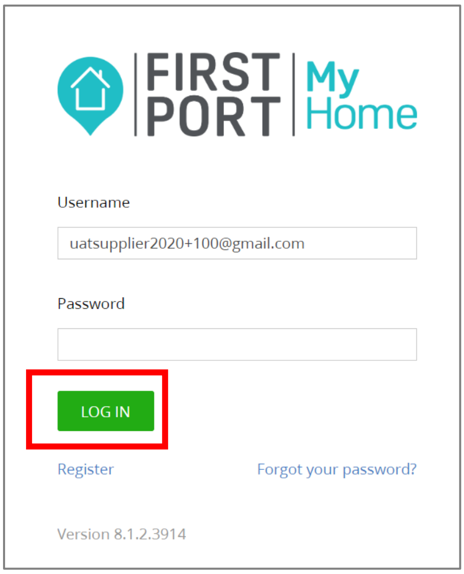
There are several things you may need to do:

- Name is wrong - verify and update name and/or email on contact. Customer can then register.
- Postcode is wrong - advise the customer to use the right post code.
- Email is wrong - A new contact will be created against the account, link the contact to the account ask them to try registering again.
- If the customer has tried this then an external user account will need to be made for them, see 'How to create an external user'

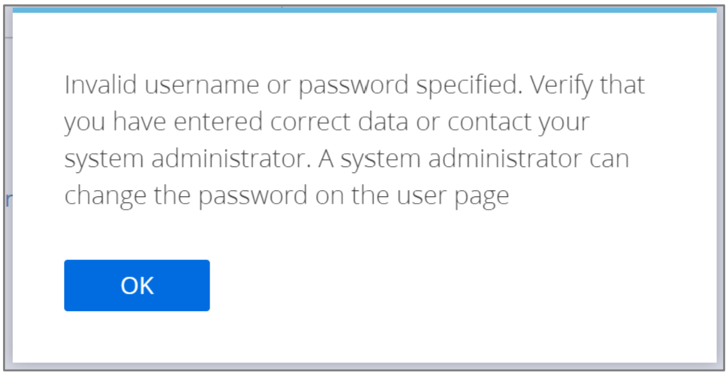
[Return to contents](#)

How do Customers Log in?

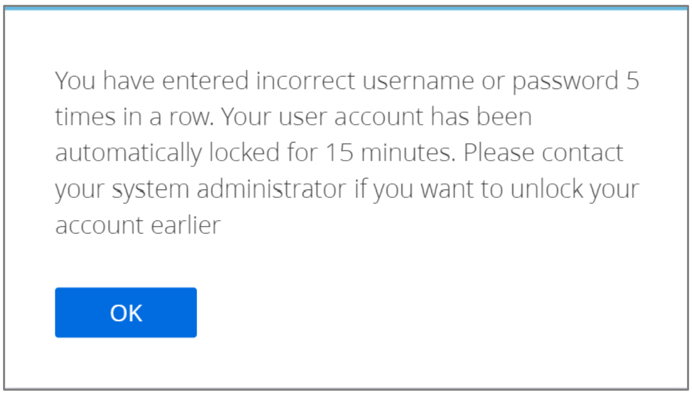
Input their email address linked associated with their contact in the **Username** field, **Password** is as they have set up, then click **Login**



If incorrect email and/ or password entered user will see below pop up, click **OK** to try again.



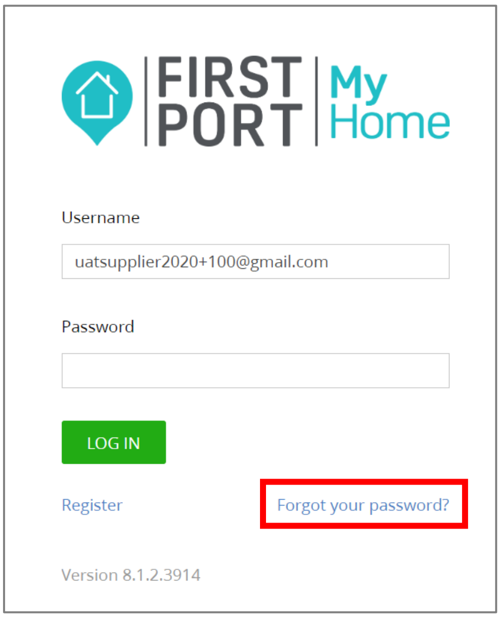
User will be locked out after 5 incorrect attempts for 15 minutes, below error message will appear. They need to let the time pass, double check all their details are correct next time, or select **Forgot Your Password.**



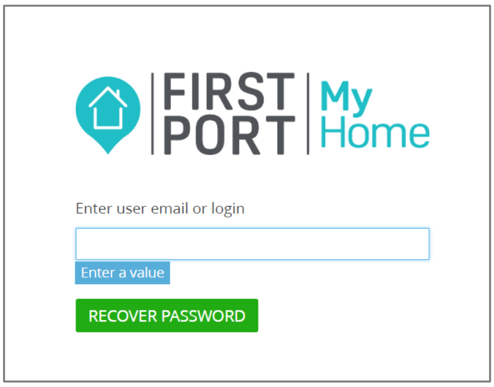
[Return to contents](#)

Password Reset

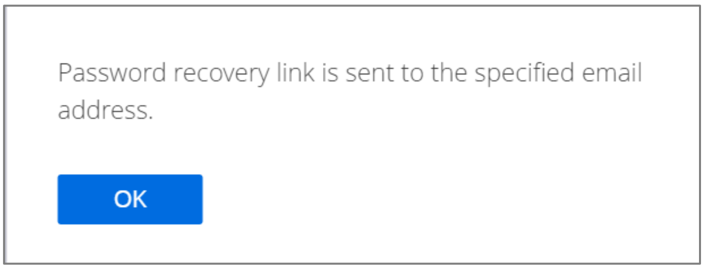
User needs to visit landing page and click the icon **Forgot your password** at the bottom right.



They will then be asked to input their email address linked to the login and click **Recover Password**

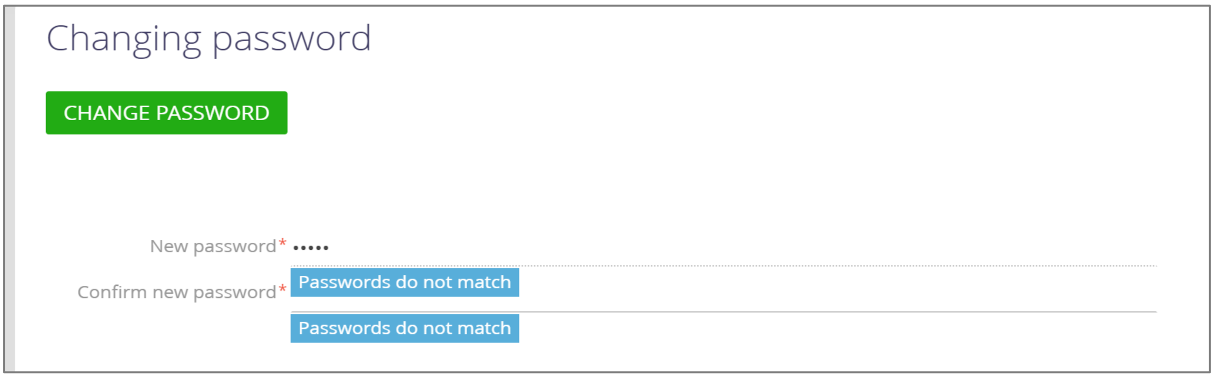


The below pop up will advise of a recovery link sent to their email to reset the password.

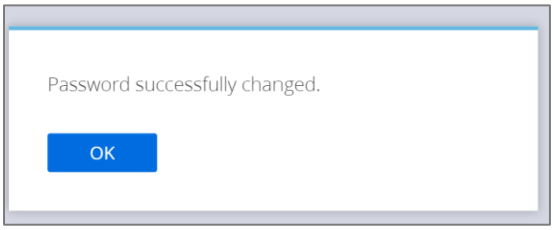


Following the link brings you to this page for Changing password

If the passwords do not match they will see this



Success message



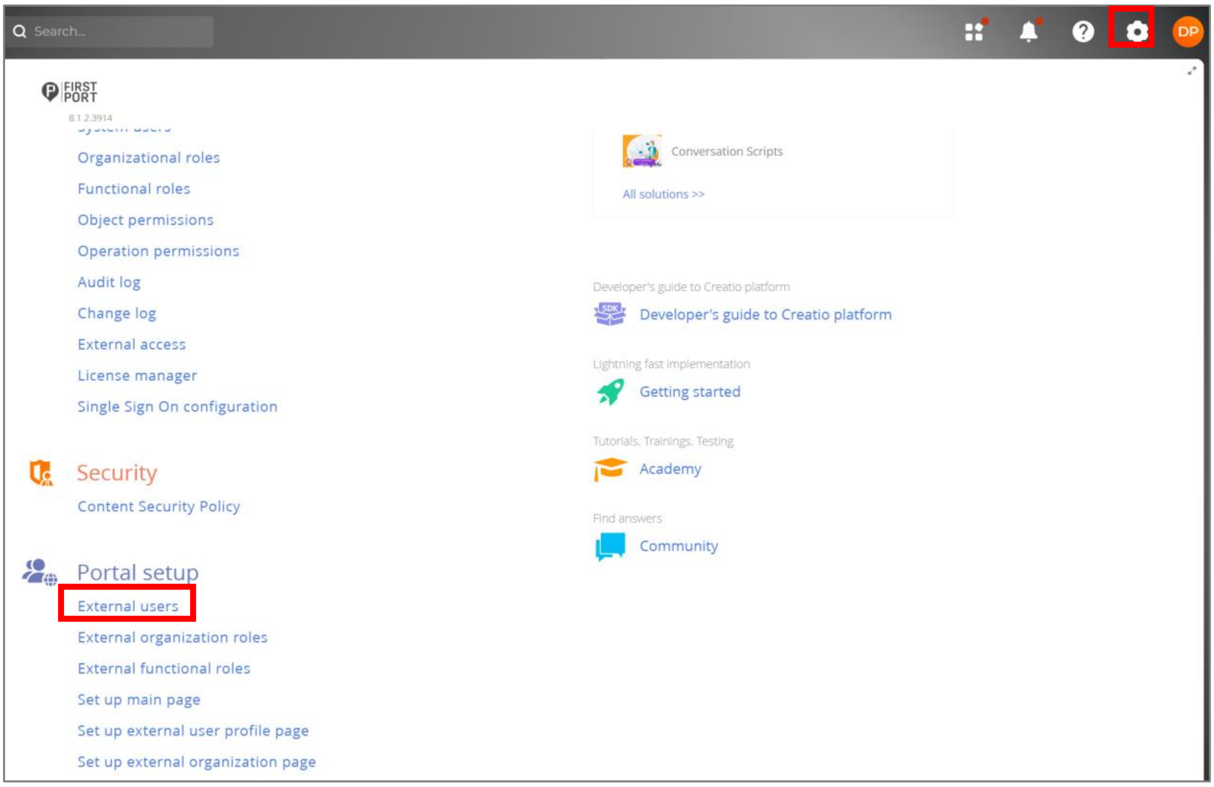
What do they do if they don’t receive the password reset link?

1. Ask the user to check their junk/ spam mailboxes to see if it is in there.
2. Then ask them to try again and check both mailboxes.
3. If still unsuccessful ask for their email address to do a manual password reset.

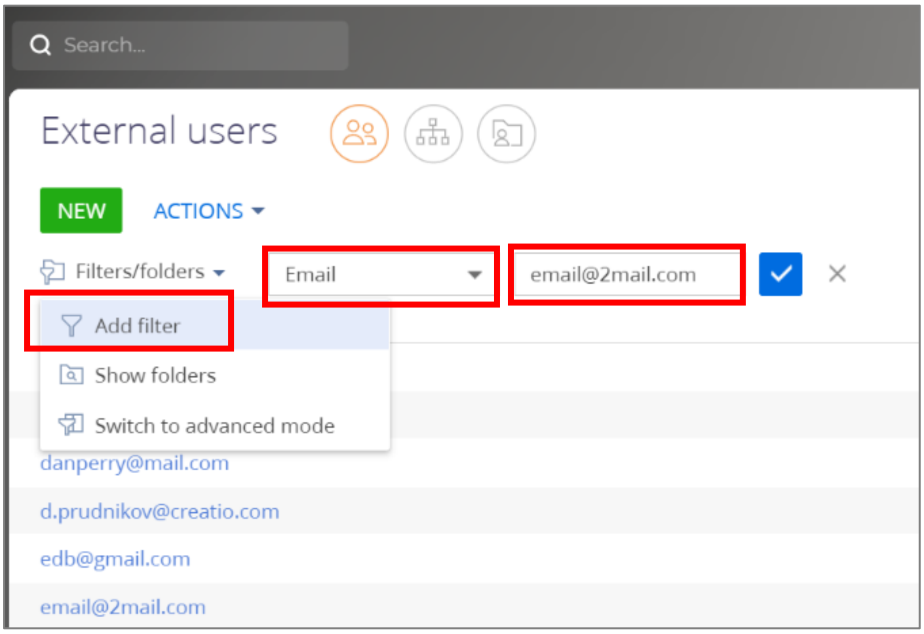
How to do a manual password reset?

Select the cog icon at the top right of the screen and then under **Portal setup,** then select **External users.**

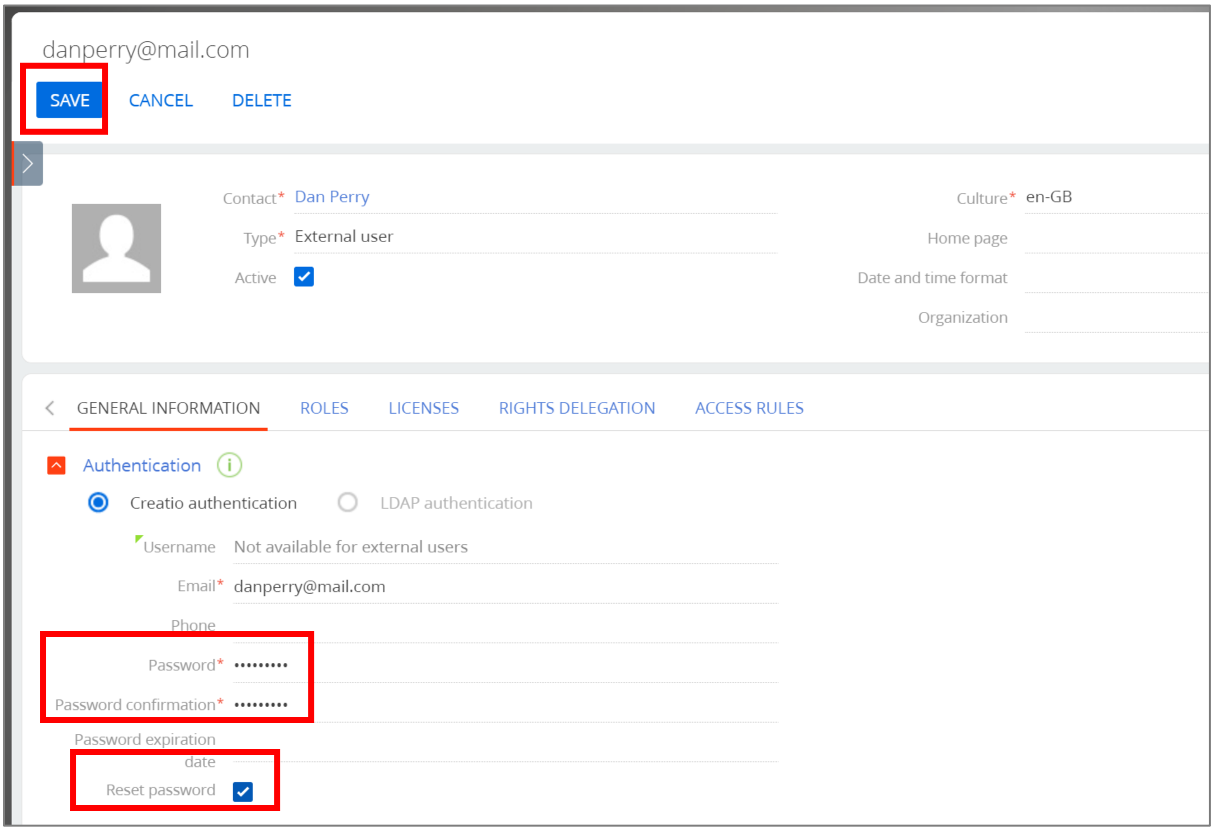
[Return to contents]



Select **Add filter** and select **Email** from the drop down menu, then input email address to the search bar and click the tick icon to find the correct user.

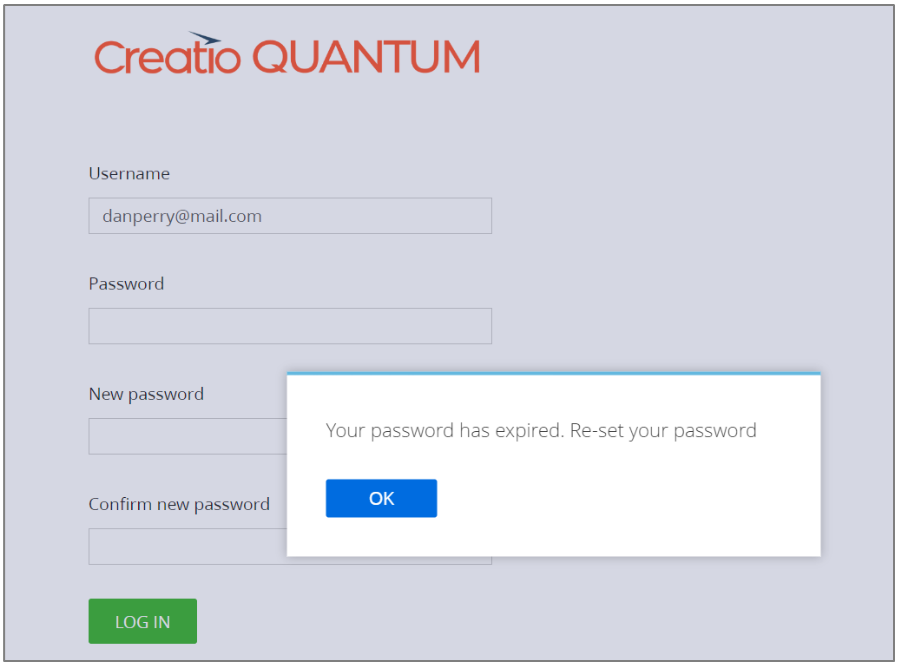


The below screen opens, input a password & confirm, this is a onetime password which will be changed by the user. Select **Reset password,** so there is a blue tick showing as below, then click **Save** at the top left of the screen and then **close** on the next screen.



The user then needs to go to the login page, put in the email address & one time password created, they will then be redirected to the password reset screen below.

Here they will need to input the one-time password in **Password**, then create their own password and confirm their new password then select **Login**. This resets the password and logs the user in.

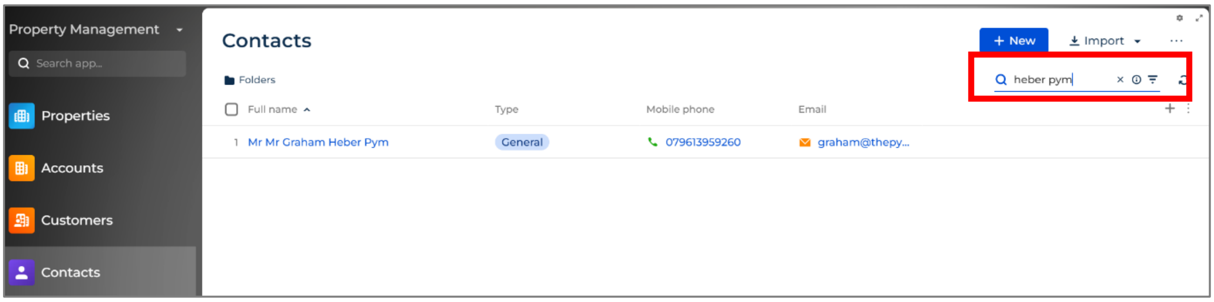


Return to contents

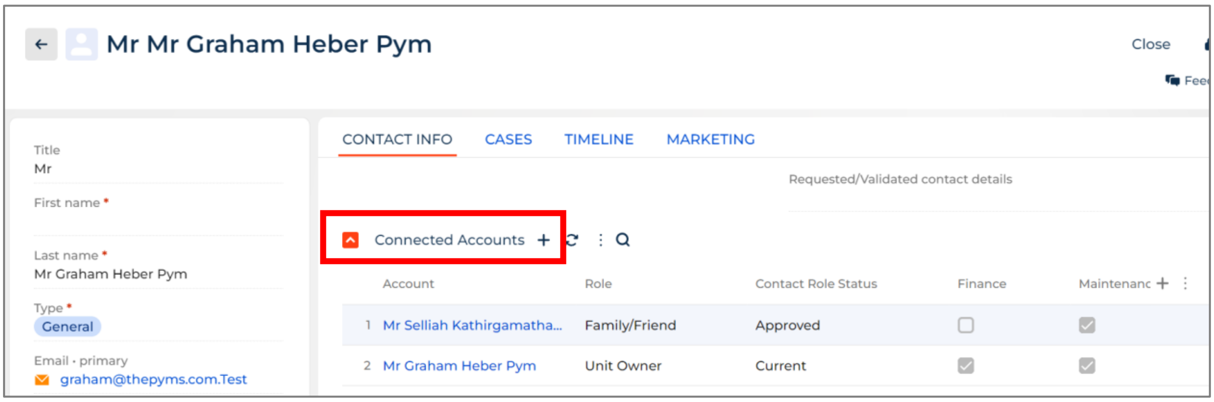
How to add multiple account addresses to one contact?

First, you will need to verify that the customer should have access to any additional accounts with your usual DPA for Data Protection reasons.

Search for the **Contact.**



Click the **+** icon next to **Connected Accounts,** to add a new account to the contact.

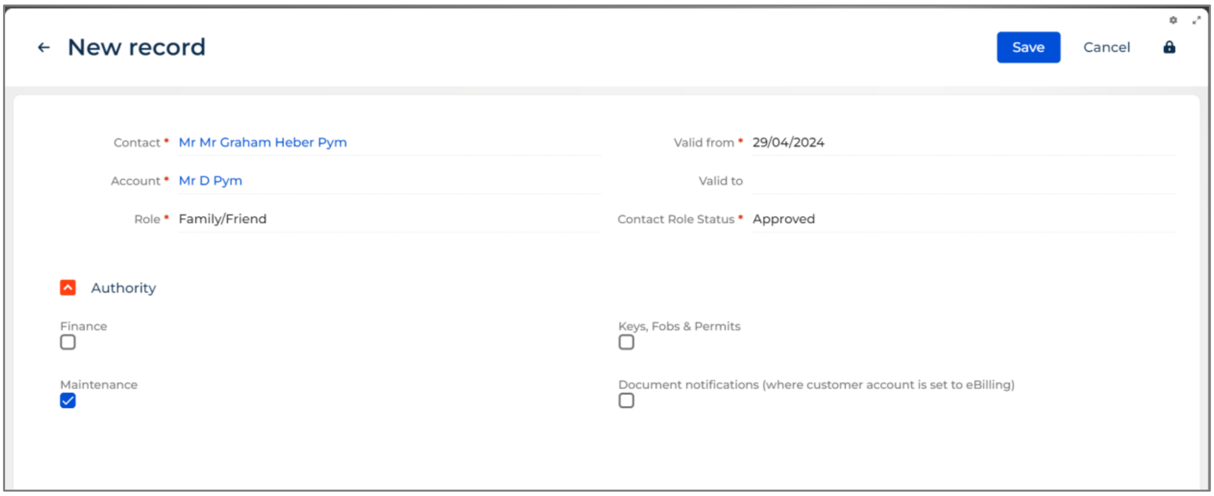


This opens the below new record screen.

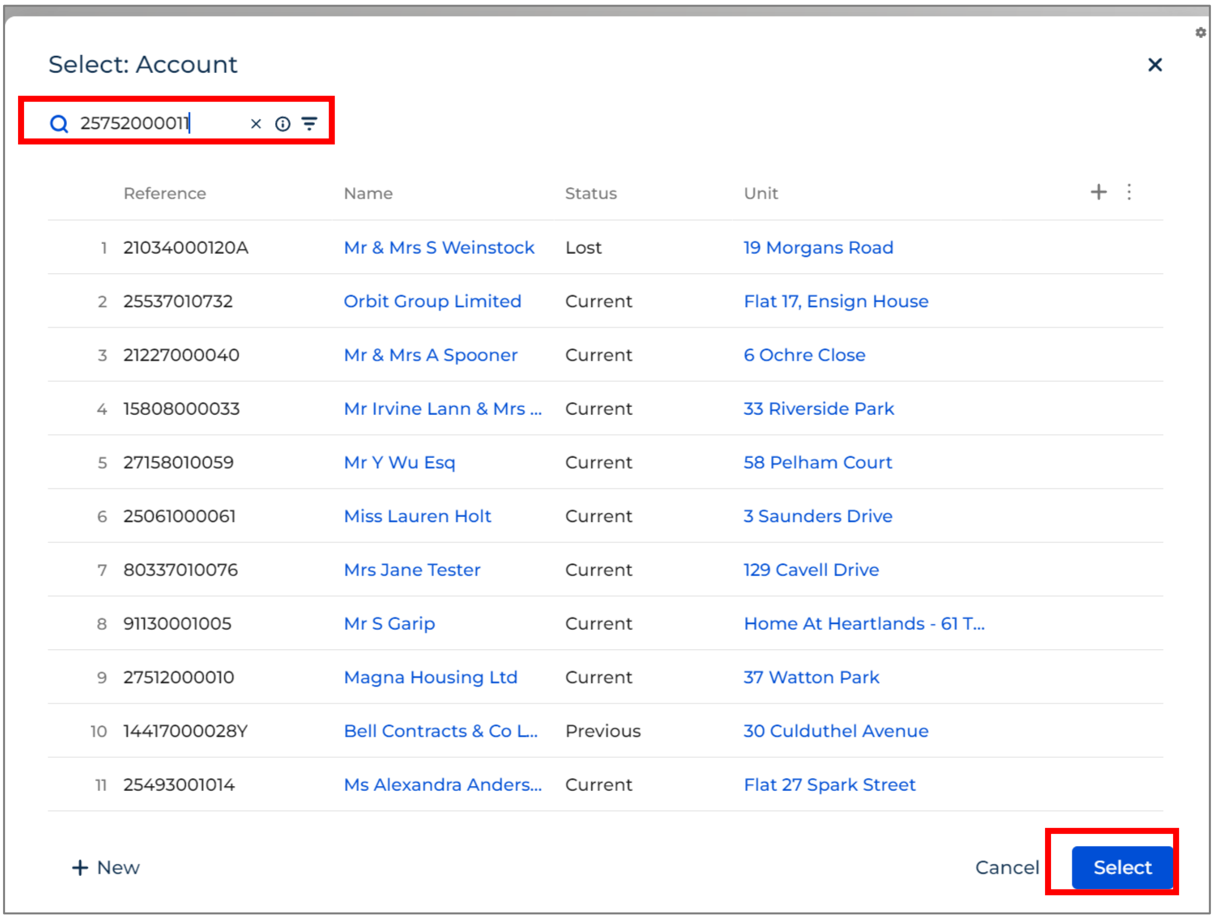
Complete the mandatory fields highlighted by red asterisks for the user.
Account is the unit that needs adding, **Role** is a dropdown list of the contact association to the unit, **Valid from** is the date the contact starts and **Contact Role Status** needs to be set to approved.

Once completed click on the **Save** icon to create the approved contact.

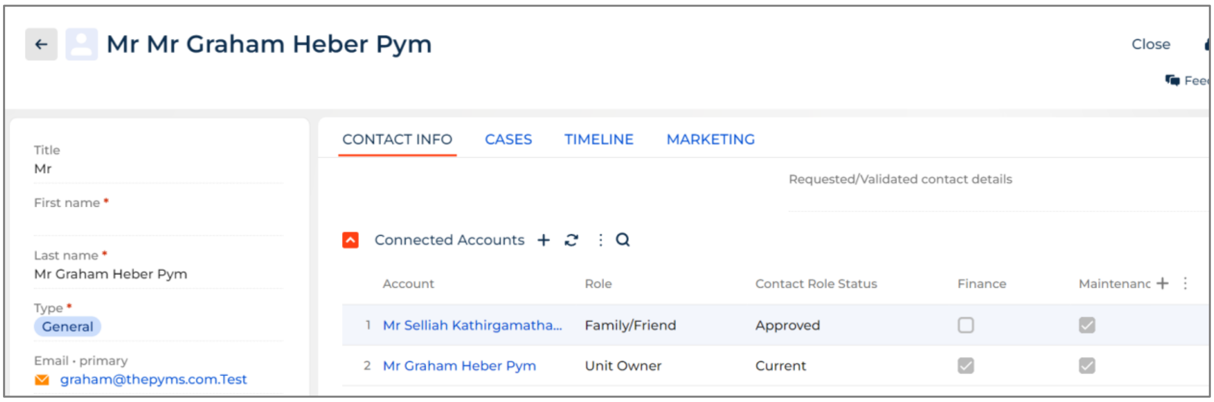
Return to contents



To search for the customer reference in account, click the magnifying glass, which opens the below screen and input the reference in the top left search box, click to select the account then confirm by clicking **Select.**

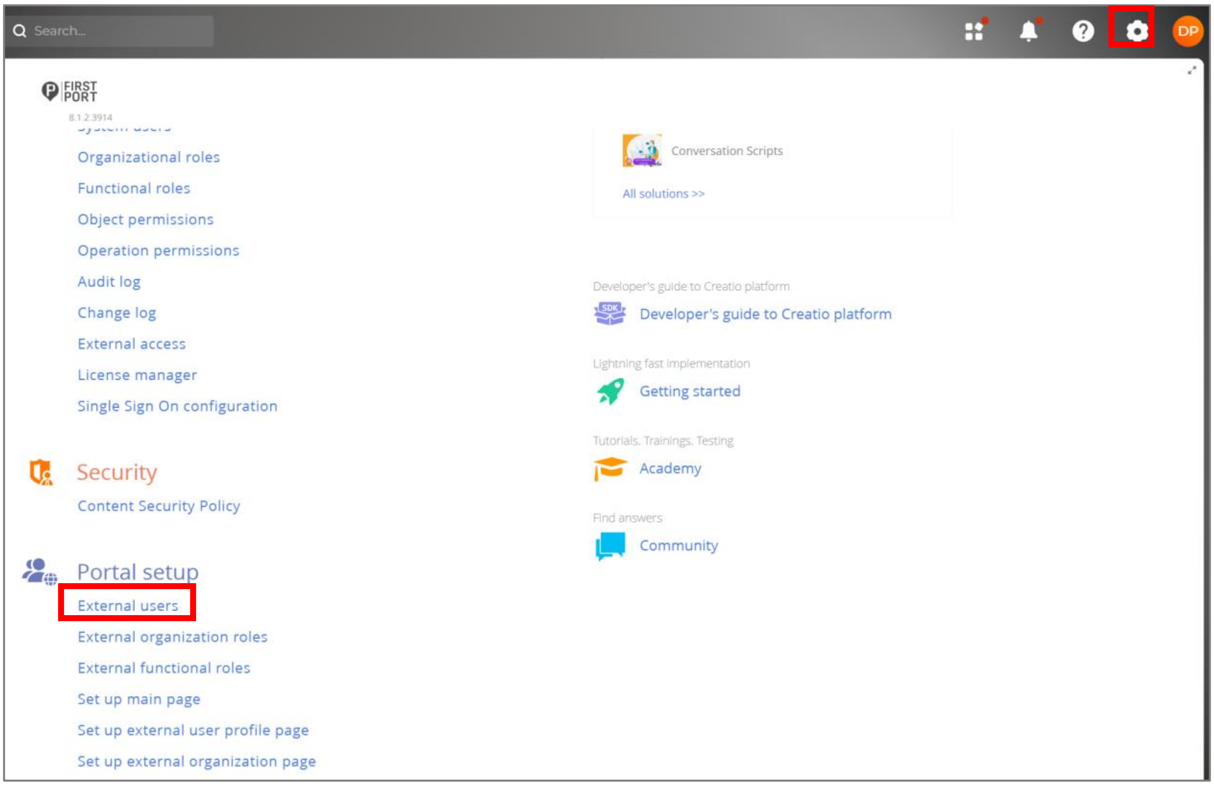


The approved account will now be showing with their access rights in the Connected accounts section, as shown below.

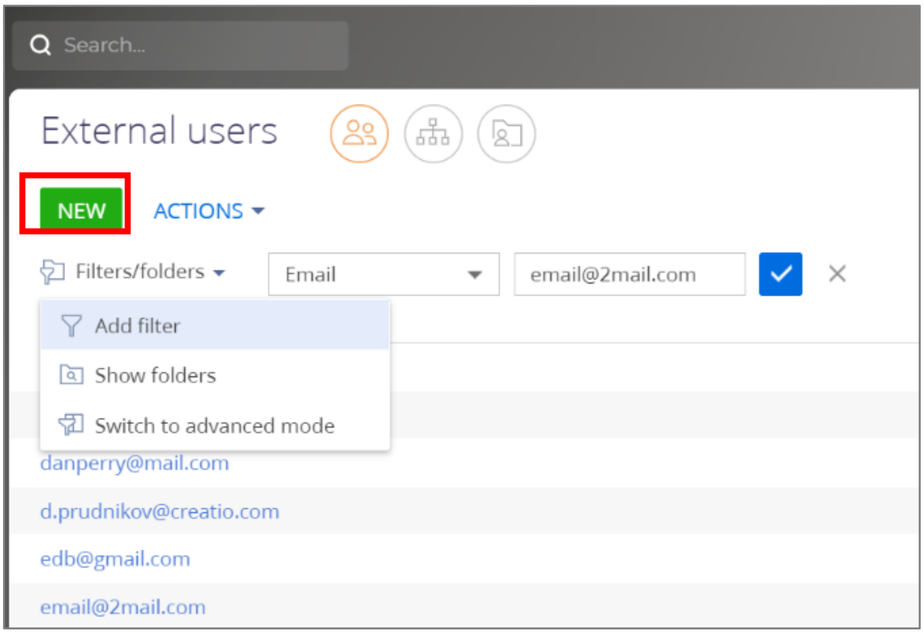


How to create an external user?

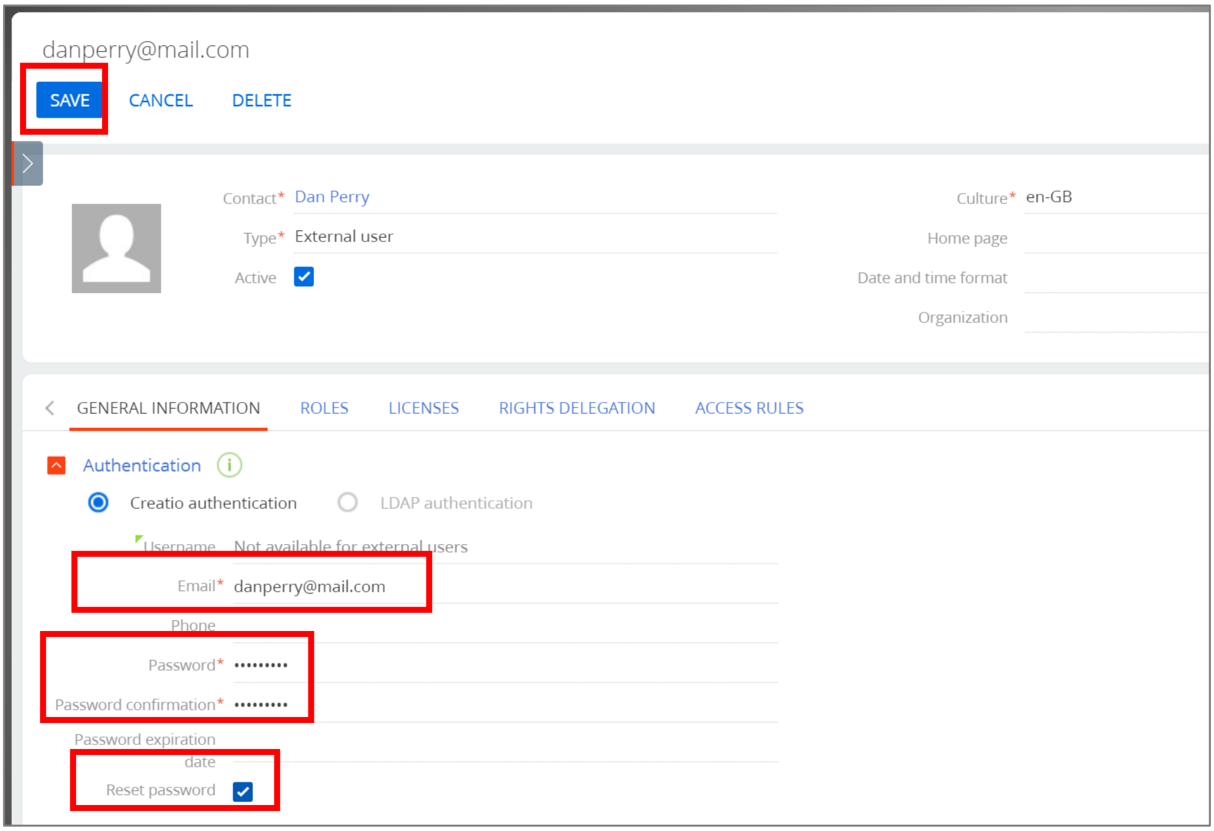
Select the cog icon at the top right of the screen and then under **Portal setup,** then select **External users.**



Select **New** as shown below.

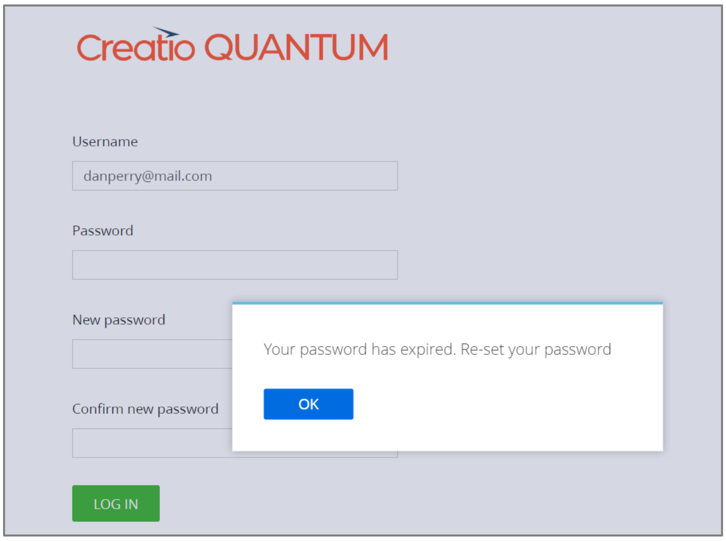


The below screen opens, input the email to be registers, a password & confirm, this is a one time password used which will be changed by the user. Select **Reset password,** so there is a blue tick showing as below, then click **Save** at the top left of the screen and then **close** on the next screen .



Return to contents

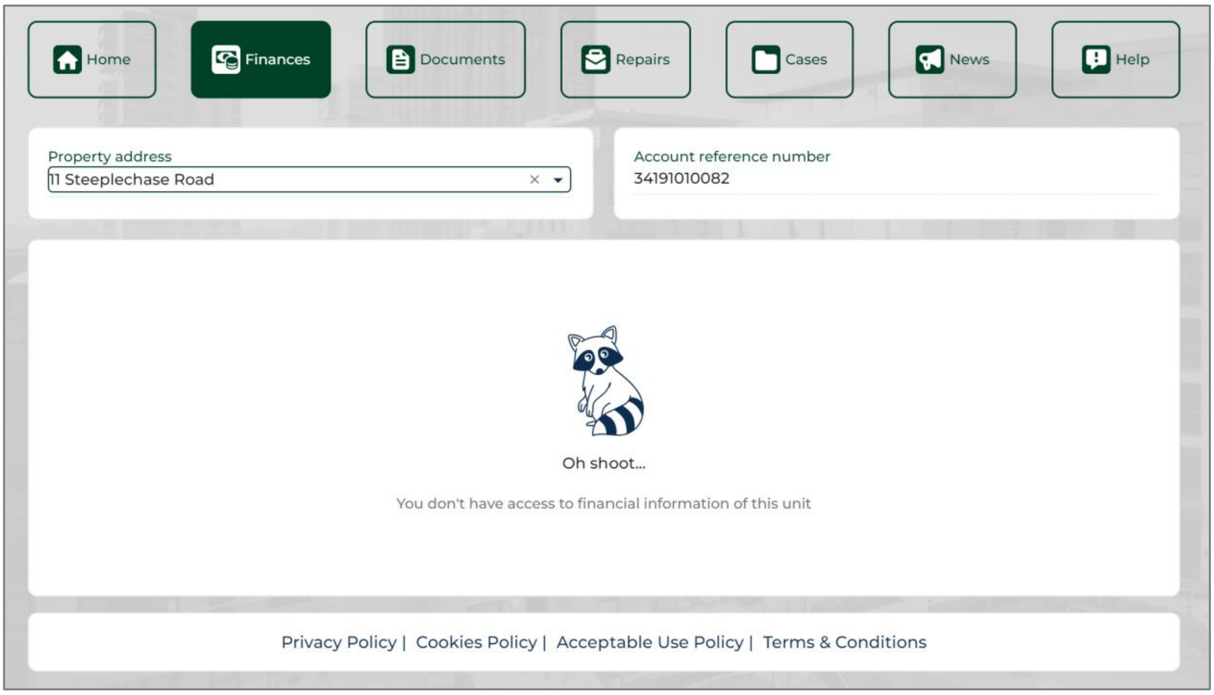
The user then needs to go to the login page, put in the email address & one time password created, they will then be redirected to the password reset screen below. Here they will need to input the one time password in **Password**, then create their own and confirm their new password then select **Login**. This resets the password and logs the user in.



Help for different error messages

No finance access view

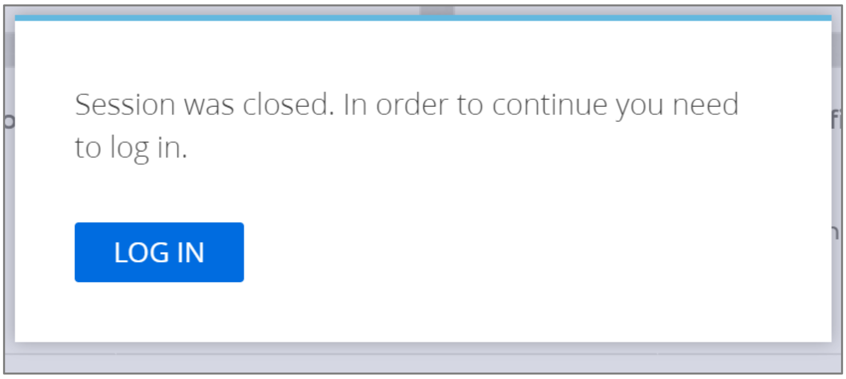
Contacts without access rights to see finances will see below when selecting finance page. This is correct, user would need approvals updated by the unit owner. Tenants would not have finance info.



Return to contents

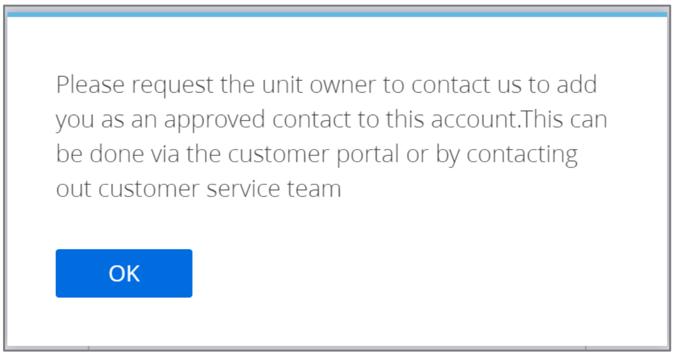
Auto log out

If the user is idle too long, they will be automatically logged out, presented with this pop up and will need to log in again.



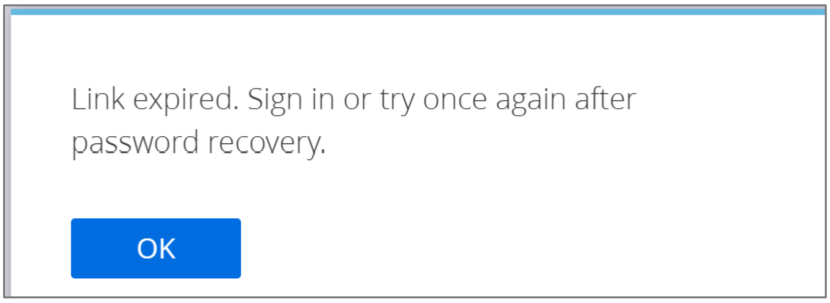
Requesting access for account that they're not the owner of

If they have not been approved by the owner they will not be able to access the portal, they will need to request permission from the owner.



Password link expired

User needs to follow **Forgot your Password** routine again from home page to generate new link.



Return to contents

Mobile & Tablet View

The portal can be accessed via mobile & tablet devices, however we are aware that there are still some issues. We recommend turning the device to landscape for the best viewing experience and ensuring all operating and browsers are updated to the latest version.