

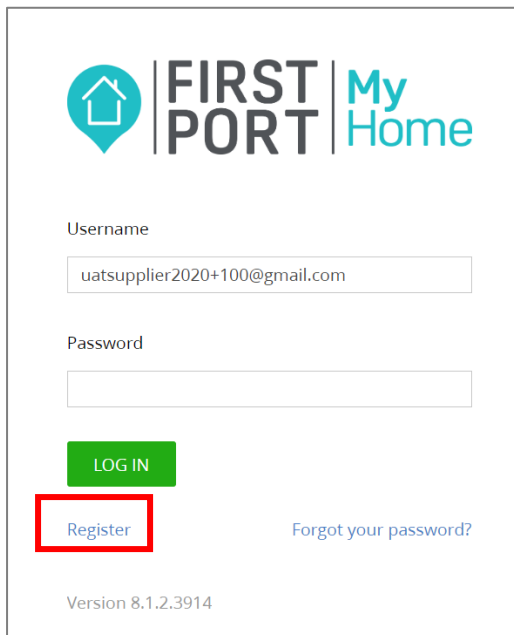
My Home Customer Portal - FAQs

Contents

How Customers Register?.....	2
What to do if the system doesn't recognise the user details?	3
How do Customers Log in?	5
Password Reset.....	6
What do they do if they don't receive the password reset link?	7
How to do a manual password reset?	7
How to add multiple account addresses to one contact?	10
How to create an external user?	12
Help for different error messages	14
No finance access view	14
Auto log out	15
Requesting access for account that they're not the owner of	15
Password link expired	15
Mobile & Tablet View	16

How Customers Register?

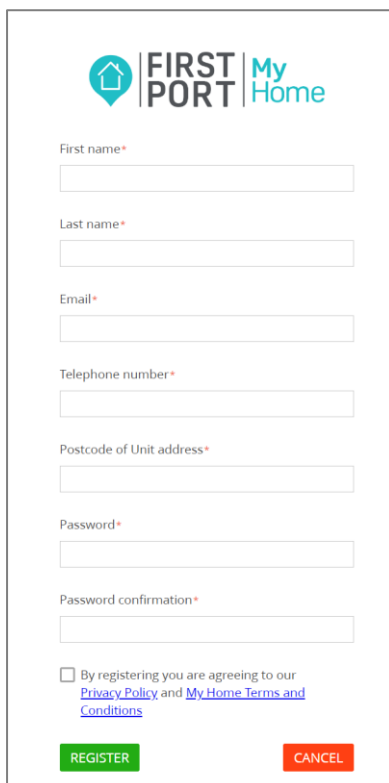
Go to **website address** and they will land on the home screen, then click **Register** as highlighted below.



The screenshot shows the 'FIRST PORT My Home' login and registration interface. It includes a logo at the top left, followed by 'Username' and 'Password' labels with corresponding input fields. A green 'LOG IN' button is positioned below the password field. A red box highlights the 'Register' link, which is located to the left of the 'Forgot your password?' link. The version number 'Version 8.1.2.3914' is displayed at the bottom left.

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.

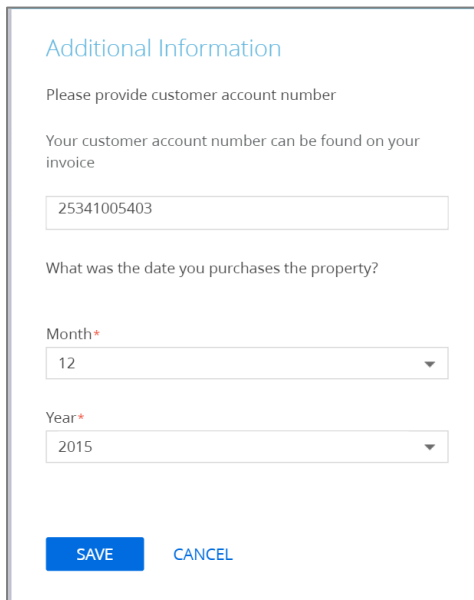


The registration pop-up form contains the following fields and elements:

- First name*
- Last name*
- Email*
- Telephone number*
- Postcode of Unit address*
- Password*
- Password confirmation*
- A checkbox with the text: "By registering you are agreeing to our [Privacy Policy](#) and [My Home Terms and Conditions](#)"
- A green 'REGISTER' button
- A red 'CANCEL' button

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.

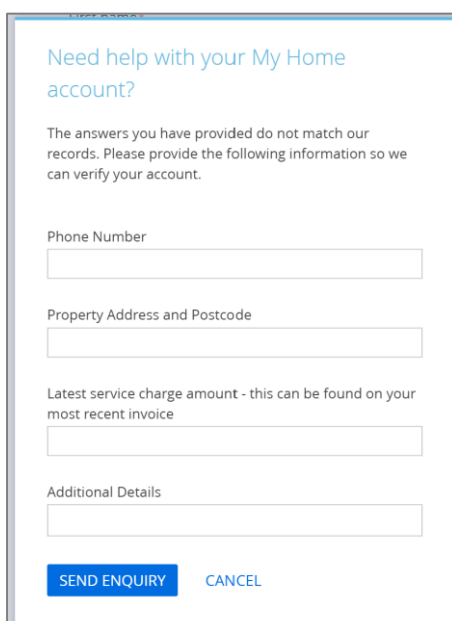


The screenshot shows a pop-up window titled "Additional Information". It contains the following elements:

- Title: "Additional Information" (in blue)
- Text: "Please provide customer account number"
- Text: "Your customer account number can be found on your invoice"
- Text input field: "25341005403"
- Text: "What was the date you purchases the property?"
- Text: "Month*" with a dropdown menu showing "12"
- Text: "Year*" with a dropdown menu showing "2015"
- Buttons: "SAVE" (blue) and "CANCEL" (grey)

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.

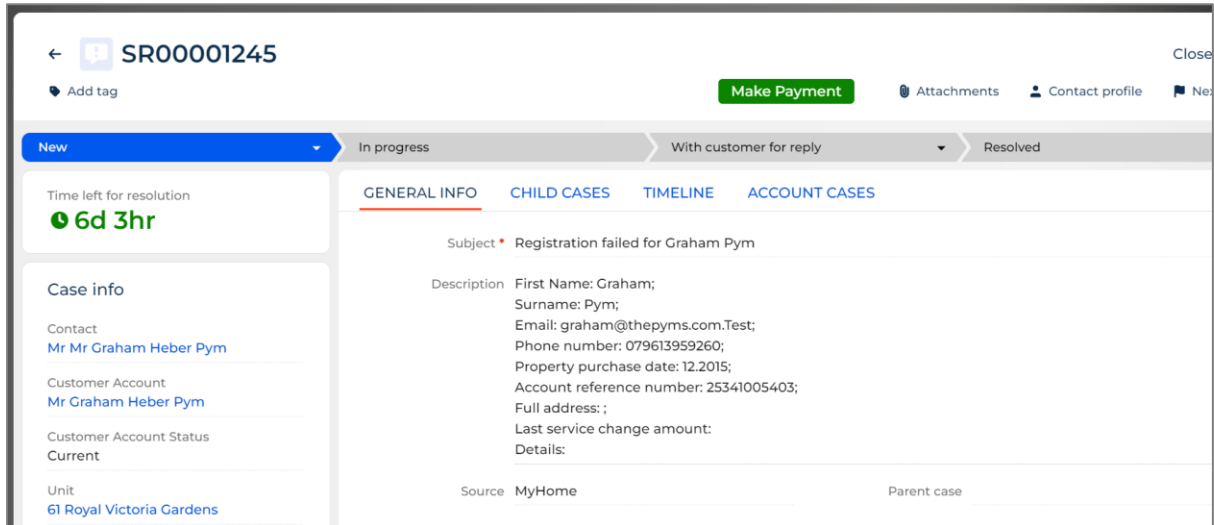
If there is already a Unit Owner contact against the Account, or the details the customer entered do not match again, a second pop up then asks the user to input further information, **Phone number, Property Address and Post Code, Latest Service Charge Amount, Additional Information**. None of these 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.



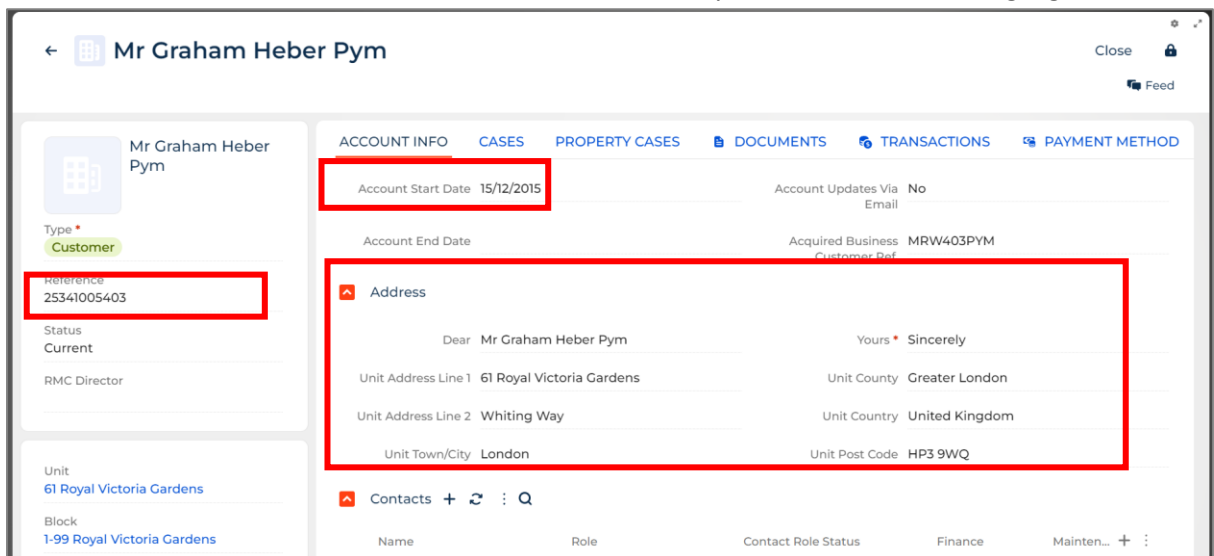
The screenshot shows a pop-up window titled "Need help with your My Home account?". It contains the following elements:

- Title: "Need help with your My Home account?" (in blue)
- Text: "The answers you have provided do not match our records. Please provide the following information so we can verify your account."
- Text: "Phone Number" with an empty text input field
- Text: "Property Address and Postcode" with an empty text input field
- Text: "Latest service charge amount - this can be found on your most recent invoice" with an empty text input field
- Text: "Additional Details" with an empty text input field
- Buttons: "SEND ENQUIRY" (blue) and "CANCEL" (grey)

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.

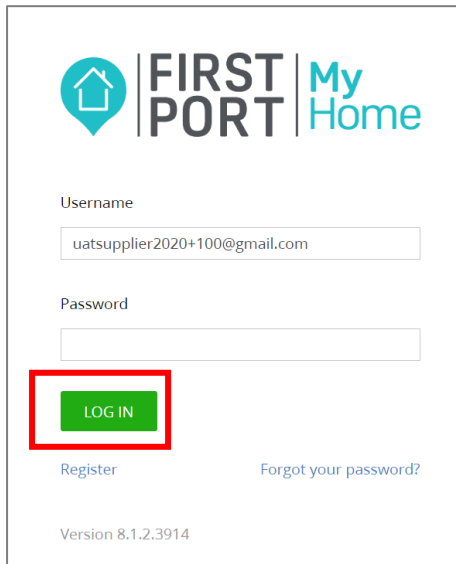


There are several things you may need to do:

- 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’](#)

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**



Username

uatsupplier2020+100@gmail.com

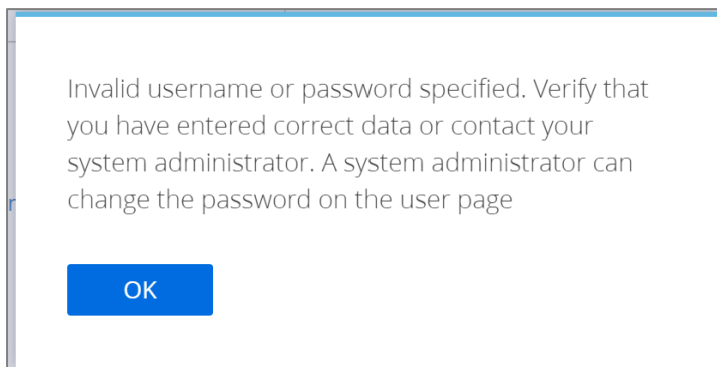
Password

LOG IN

[Register](#) [Forgot your password?](#)

Version 8.1.2.3914

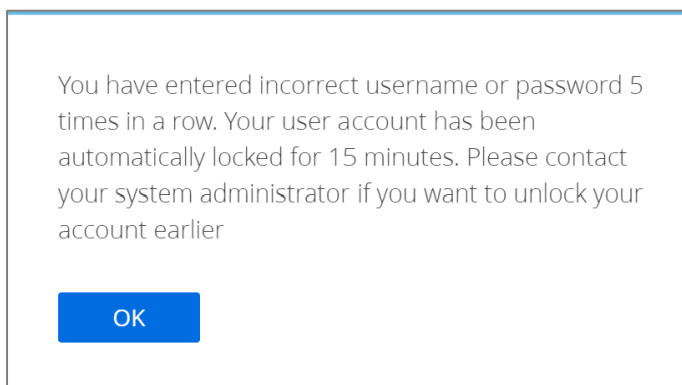
If incorrect email and/ or password entered user will see below pop up, click **OK** to try again.



Invalid username or password specified. Verify that you have entered correct data or contact your system administrator. A system administrator can change the password on the user page

OK

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**.

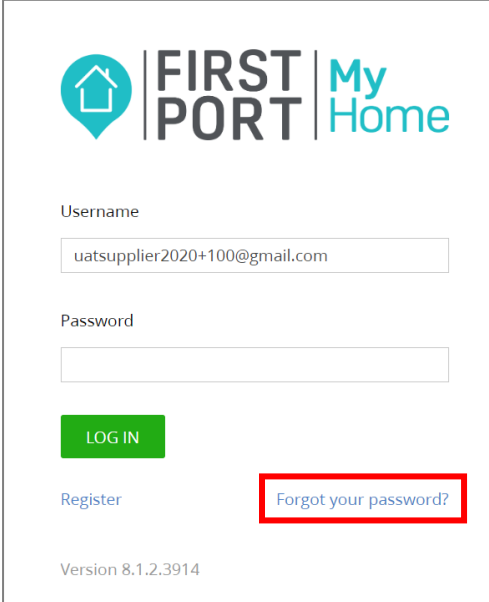



You have entered incorrect username or password 5 times in a row. Your user account has been automatically locked for 15 minutes. Please contact your system administrator if you want to unlock your account earlier

OK

Password Reset

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





Username

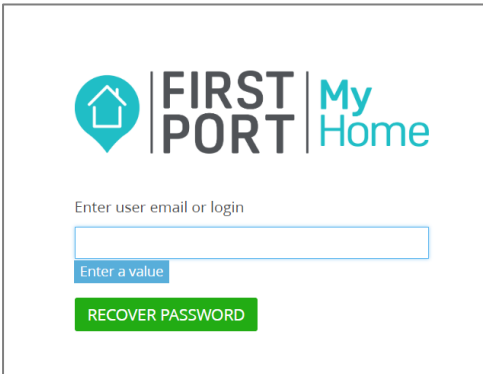
Password


[LOG IN](#)

[Register](#) [Forgot your password?](#)

Version 8.1.2.3914

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

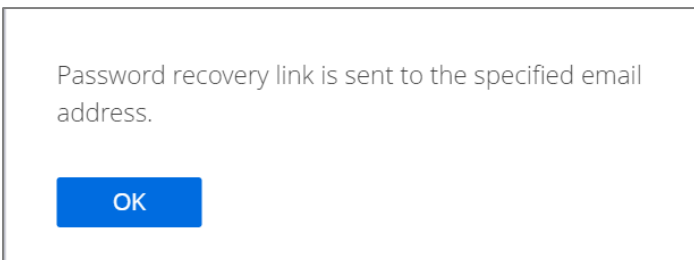




Enter user email or login

[RECOVER PASSWORD](#)

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



Password recovery link is sent to the specified email address.

[OK](#)

Following the link brings you to this page for Changing password



FIRST PORT My Home

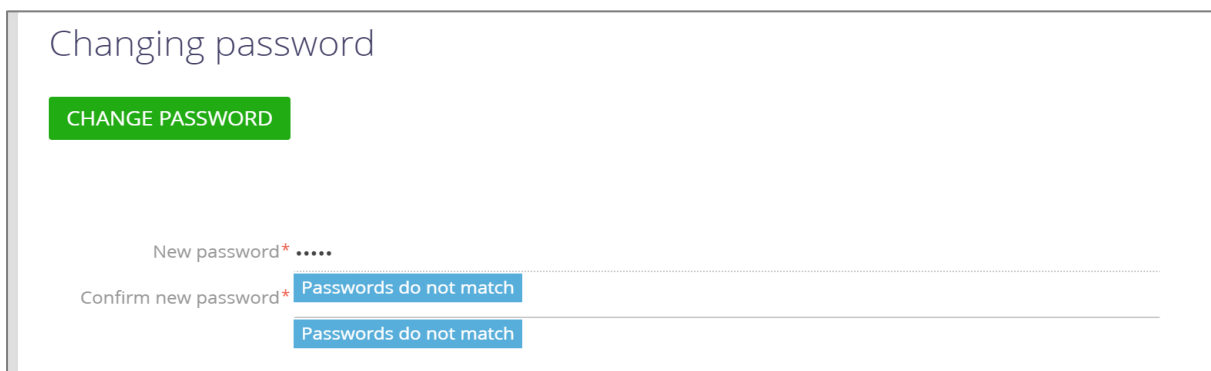
Changing password

CHANGE PASSWORD

New password*

Confirm new password*

If the passwords do not match they will see this



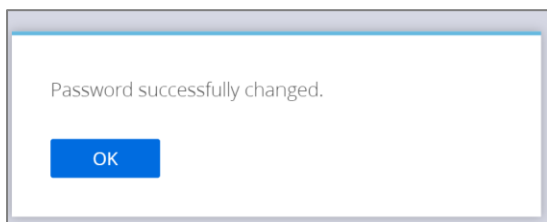
Changing password

CHANGE PASSWORD

New password*

Confirm new password*

Success message



Password successfully changed.

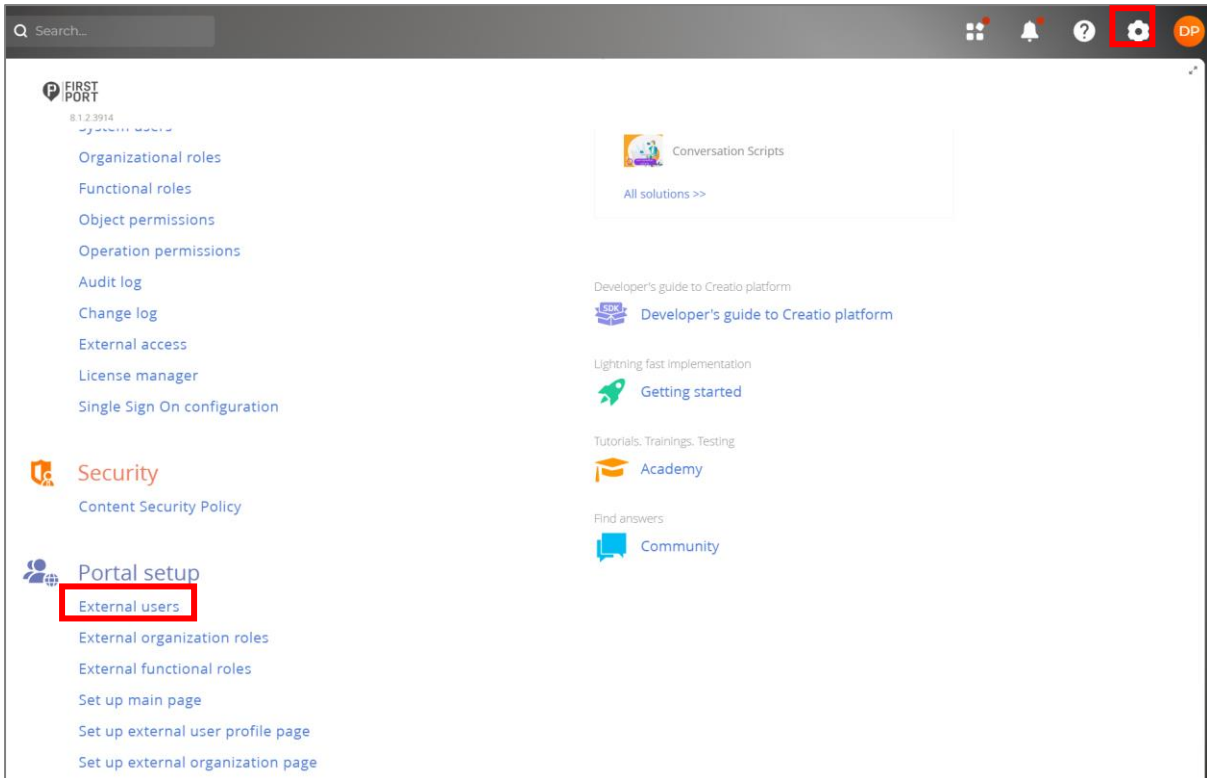
OK

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

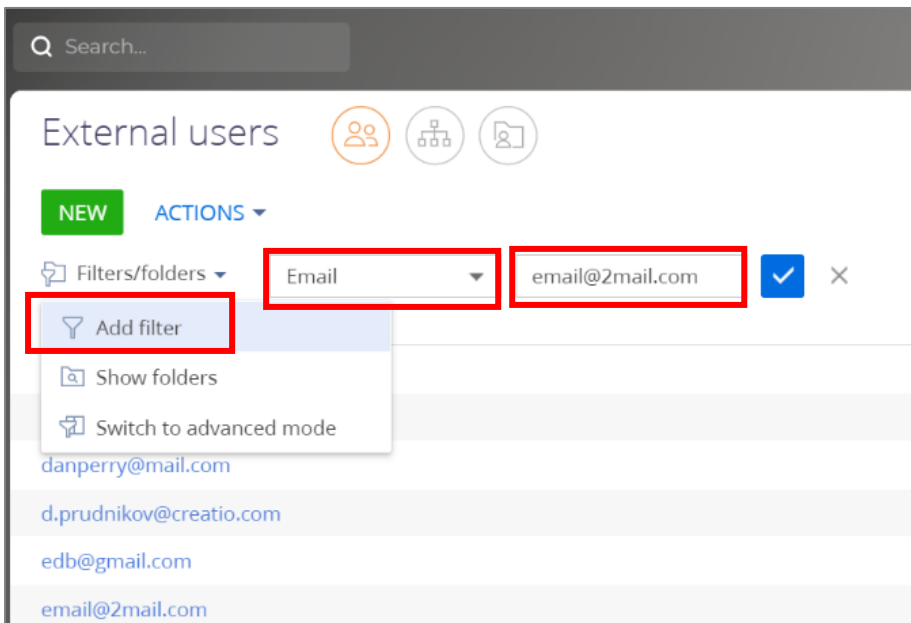
1. Ask the user to check their junk/ spam mailboxes to see if it is in there.
2. Then ask them to try again and check both mailboxes.
3. If still unsuccessful ask for their email address to do a [manual password reset](#).

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**.



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.

danperry@mail.com

SAVE CANCEL DELETE

Contact* Dan Perry Culture* en-GB

Type* External user Home page

Active Date and time format

Organization

GENERAL INFORMATION ROLES LICENSES RIGHTS DELEGATION ACCESS RULES

Authentication ⓘ

Creatio authentication LDAP authentication

Username Not available for external users

Email* danperry@mail.com

Phone

Password*

Password confirmation*

Password expiration date

Reset password

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.

Creatio QUANTUM

Username
danperry@mail.com

Password

New password

Confirm new password

LOG IN

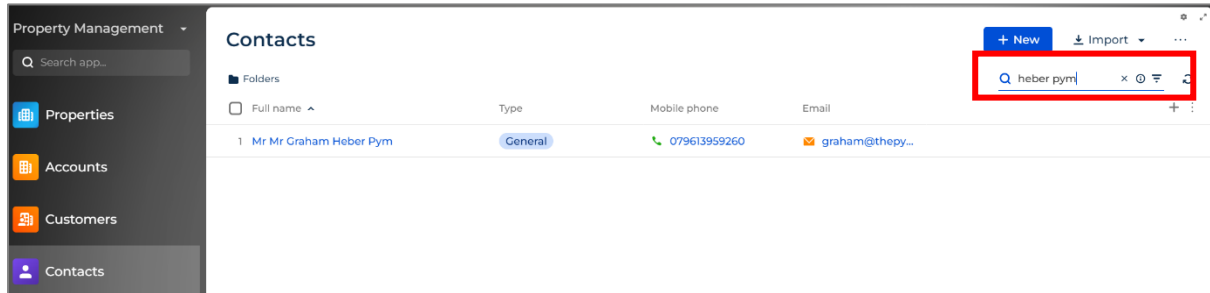
Your password has expired. Re-set your password

OK

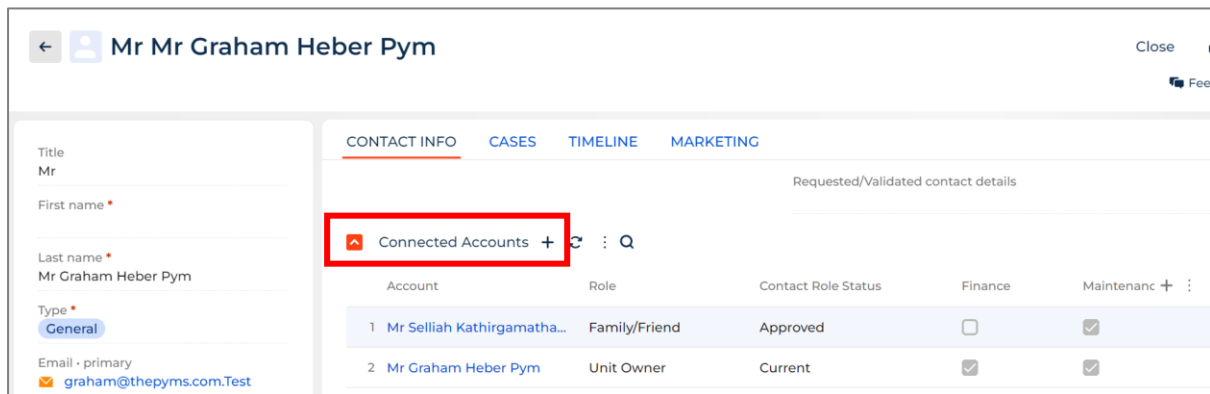
How to add multiple account addresses to one contact?

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.

← **New record** Save Cancel 🔒

Contact • **Mr Mr Graham Heber Pym** Valid from • **29/04/2024**

Account • **Mr D Pym** Valid to

Role • **Family/Friend** Contact Role Status • **Approved**

Authority

Finance

Maintenance

Keys, Fobs & Permits

Document notifications (where customer account is set to eBilling)

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**.

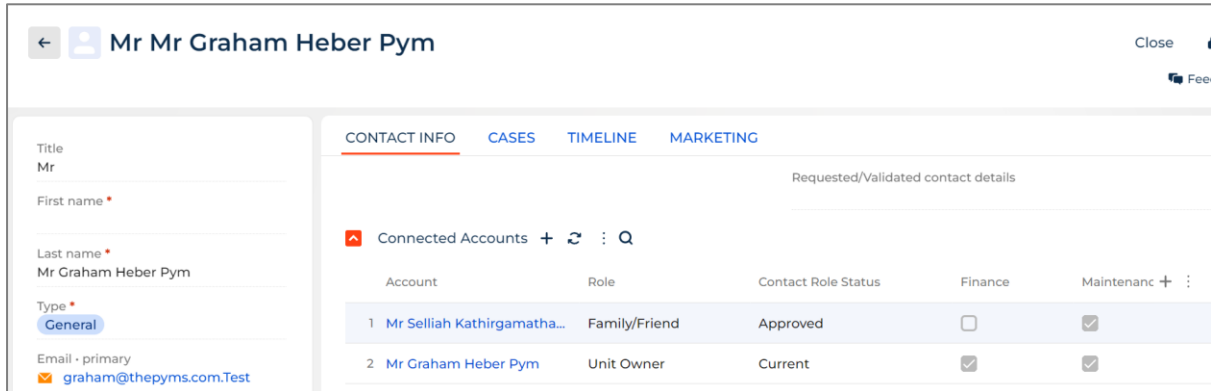
Select: Account × ⚙️

× 🔍 📄

Reference	Name	Status	Unit	+	:
1 21034000120A	Mr & Mrs S Weinstock	Lost	19 Morgans Road		
2 25537010732	Orbit Group Limited	Current	Flat 17, Ensign House		
3 21227000040	Mr & Mrs A Spooner	Current	6 Ochre Close		
4 15808000033	Mr Irvine Lann & Mrs ...	Current	33 Riverside Park		
5 27158010059	Mr Y Wu Esq	Current	58 Pelham Court		
6 25061000061	Miss Lauren Holt	Current	3 Saunders Drive		
7 80337010076	Mrs Jane Tester	Current	129 Cavell Drive		
8 91130001005	Mr S Garip	Current	Home At Heartlands - 61 T...		
9 27512000010	Magna Housing Ltd	Current	37 Watton Park		
10 14417000028Y	Bell Contracts & Co L...	Previous	30 Culduthel Avenue		
11 25493001014	Ms Alexandra Anders...	Current	Flat 27 Spark Street		

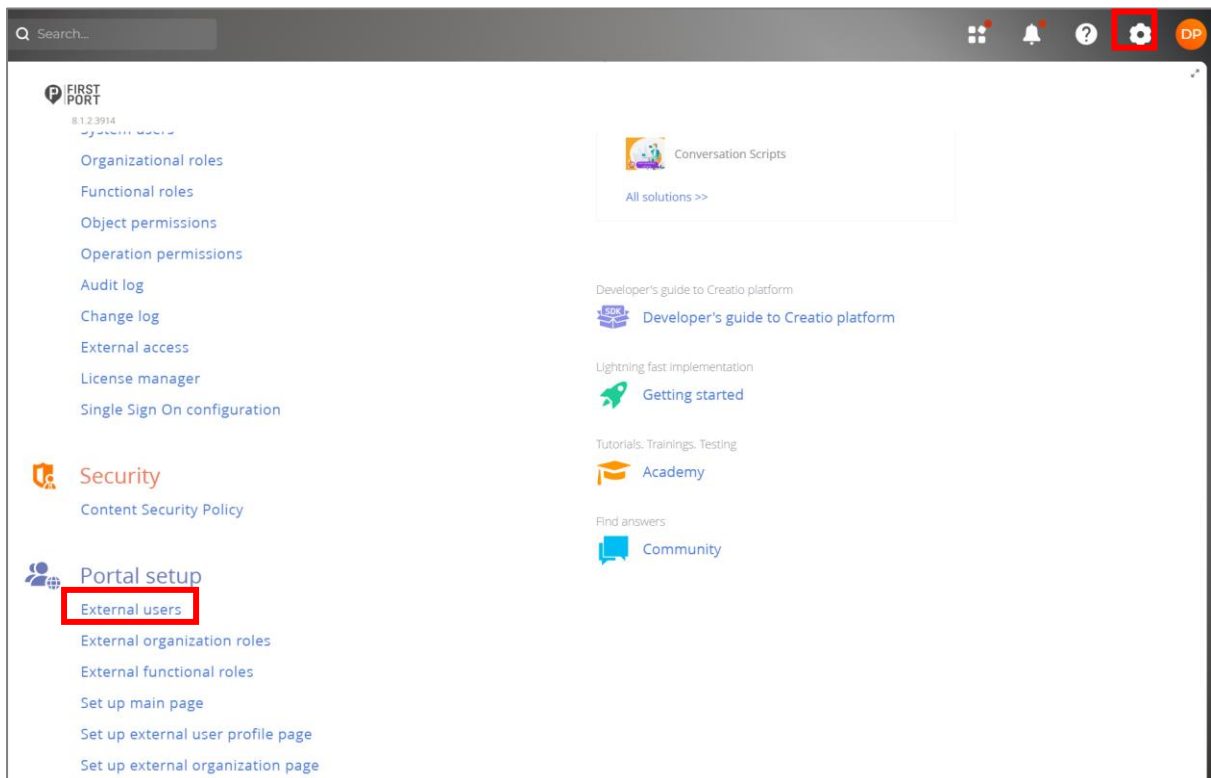
+ New Cancel Select

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

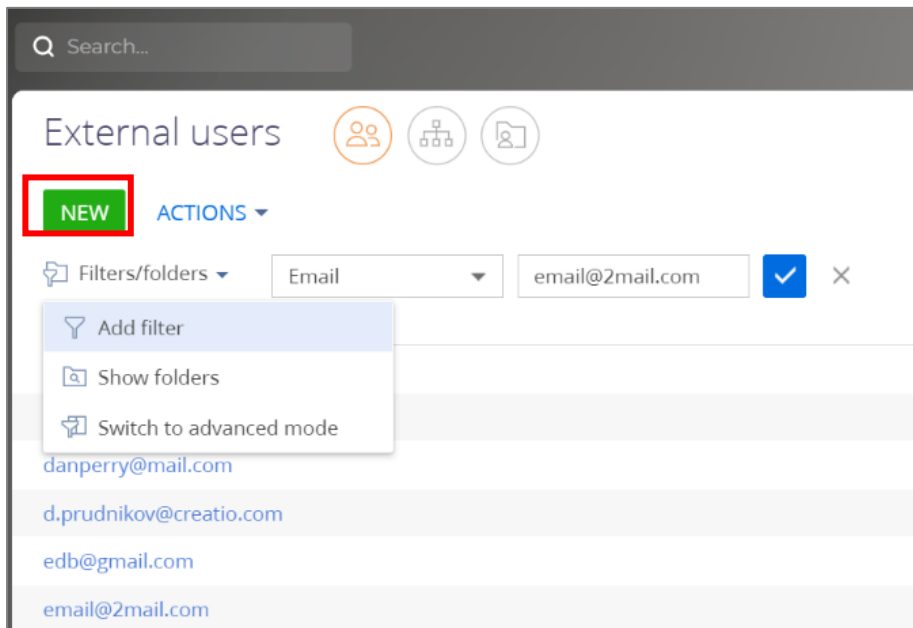


How to create an external user?

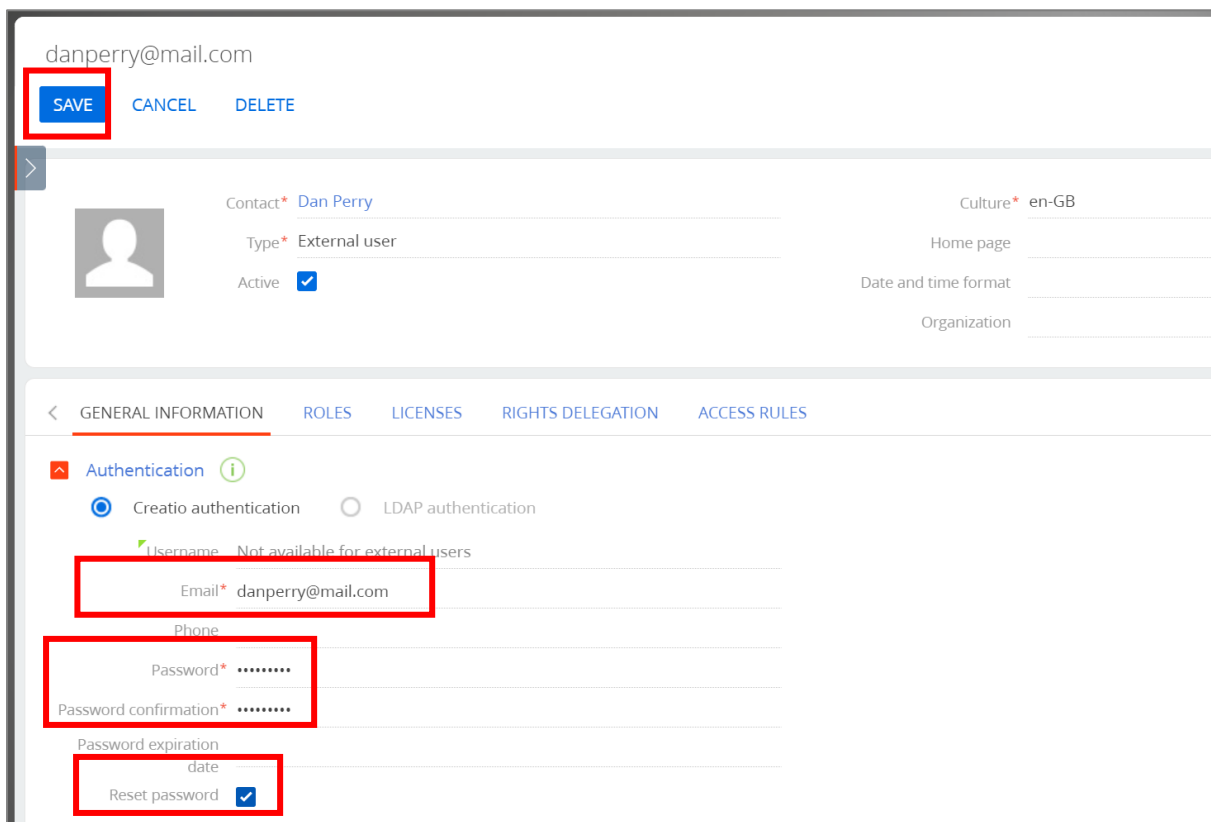
Select the cog icon at the top right of the screen and then under **Portal setup**, then select **External users**.



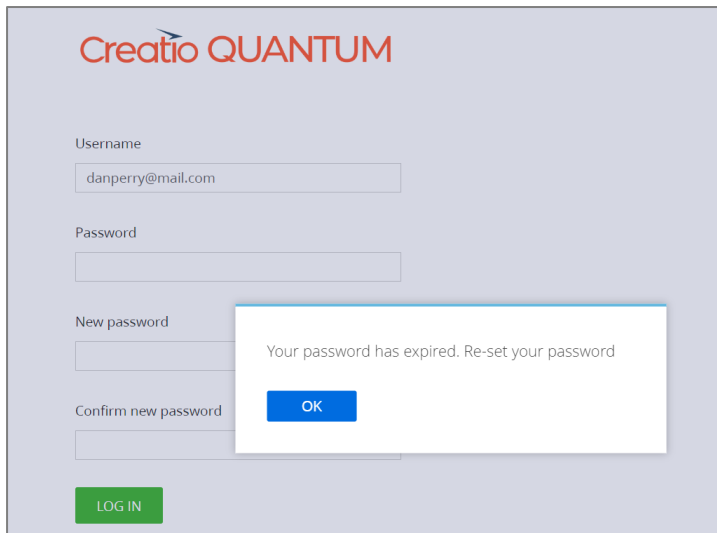
Select **New** as shown below.



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 .



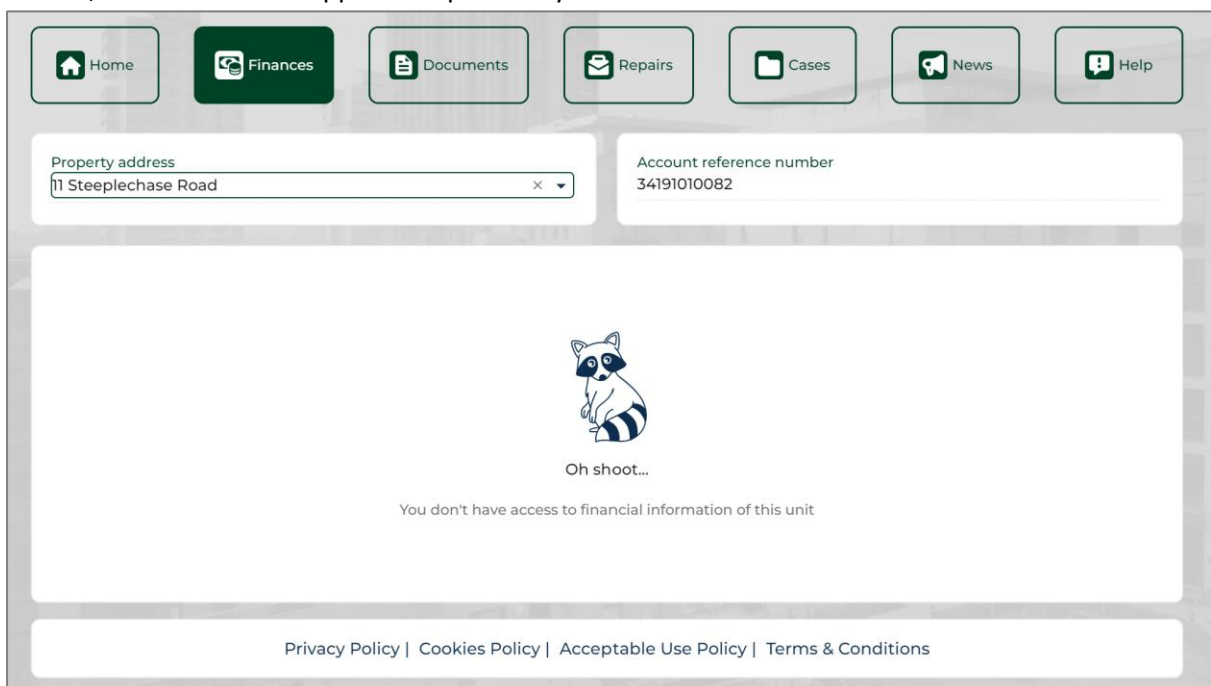
The user then needs to go to the login page, put in the email address & one time password created, they will then be redirected to the password reset screen below. Here they will need to input the one time password in **Password**, then create their own and confirm their new password then select **Login**.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



Help for different error messages

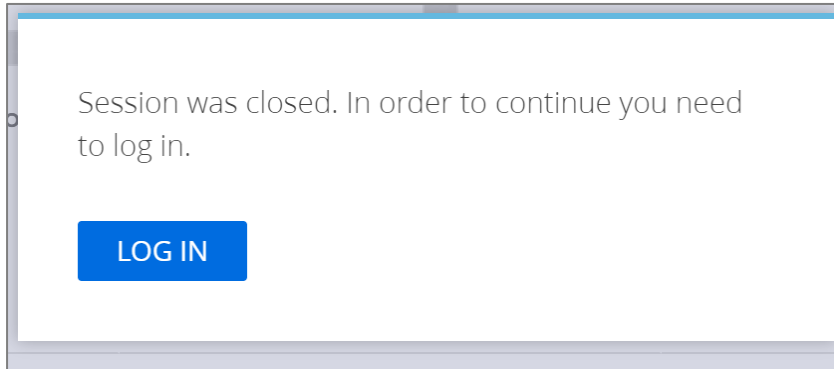
No finance access view

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.



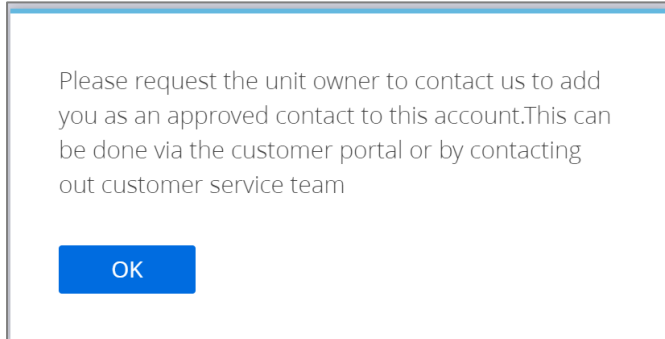
Auto log out

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.



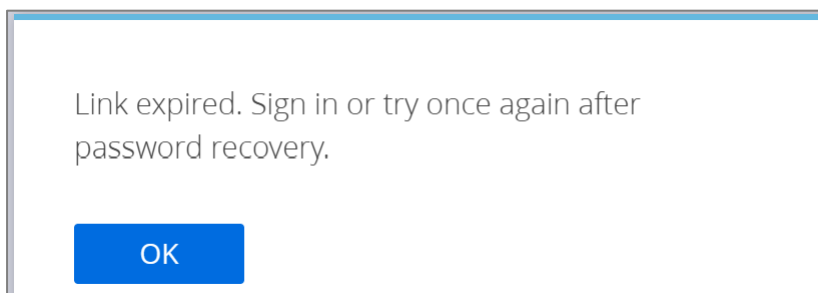
Requesting access for account that they're not the owner of

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.



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.