

Patterson-Schwartz Real Estate

Coastal Rentals & Sales

Office: 302-239-3003

18958 Coastal Highway Rehoboth, DE 19971 **pattersonschwartz.com**

Owner X: Mobile and Desktop Versions

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Patterson-Schwartz Real Estate | Coastal Rentals & Sales Office: 302-239-3003 | 18958 Coastal Highway, Rehoboth, DE 19971 pattersonschwartz.com GETTING STARTED

App download and installation

The app is available for download for Apple and Android devices under the name $\mathsf{Owner}\ \mathbf{X}.$



Follow your phone's instructions to install the app.

Get in touch with us if you experience any issues during the process.

Owner desktop access

Besides managing your home through your mobile device, you may also login from a desktop by navigating to https://ownerx.streamlinevrs.com/

Logging In



The Login Now screen is the first screen you will see.

You will use your **Streamline Login/Username and password** to log in, as provided in the access email.



NOTE: The same user id and password will work with the Owner App and desktop access. Get in touch with us if you have any issues logging in.

DASHBOARD

The Dashboard is the first screen you will see after logging in.

It presents a **drop-down menu** where you can select the **Property** you want to work with as well as the **unit's management tools**.



Note: Only your **Active** units will show in this area. Reach out to us if you notice a home is missing.





FIGURE 3: DESKTOP MODULE VIEW

FIGURE 2: APP VIEW

- 1. View your Reservations for the unit's
- 2. Check and block that unit. Availability Calendar.
- 3. View and add Work Orders.
- 4. Access some unit Reports.

- 5. View any attachments added to the unit
- 6. View and add unit Service Task.



Note: Not all the management tools shown above may be available, as these depend on our system setup. Reach out to us if you have any questions.

In the App, clicking on the Menu \equiv on open the Main Menu:

on any of the screens will

Dashboard Menu Options

Reservations

In this area you will be able to view reservations and modify or cancel your future **Reservations**.

 Reservations 	=	←	Reservation # 1500	
Yew Tree Cottage⊙		Genei	ral Information	
Show only my reservations		Unit Yew	Tree Cottage	
Q Search Reservations		Guest Mana	name agement C	
Confirmation # 1500 Management C		Creat 12/03	ed /2021 10:56 AM	
01/11/2022 - 01/15/2022 Owner Block	>	Type OWN	I	
Confirmation # 1502 Management C	>	Statu: Book	s æd	
Owner Self Clean		Guest 2/0	s (Adults/children)	
		Booki 01/11/	ng Dates 2022 - 01/15/2022	
		Night 4	s	
		Room \$0.00	ı Rent	
		Addit	ional Fields	
		Reser 3:00	vation: Auto Check-In Time PM	
		Reser 10:00	vation: Auto Check-Out Time AM	
			MANAGE CANCI	L

FIGURE 5: RESERVATION DETAILS

Availability Calendar

Use the Availability Calendar to easily view the unit's availability, make reservations or create Owner Blocks. This interactive calendar with simple data gathering process enables easy unit management.

You can scroll through monthly calendars to view the unit's occupancy.

← Availability = La Encantada December 2019 (\ \rightarrow Sun Mon Tue Wed Thu Fri Sat 7 3 4 5 6 9 10 11 13 14 8 12 16 17 18 19 20 21 15 23 24 25 26 27 28 22 29 30 31 CLEAR DATES □ Vacant Maintenance Block Owner Block Standard

Steps to make Reservation

FIGURE 6: AVAILABILITY CALENDAR

- 1. Select the reservation type.
- 2. Select [Check In]. and [Check Out] dates in the Calendar.
- 3. Enter the remaining reservation information.
- 4. Select [Make Reservation]
- 5. View confirmation screen



Work Orders

In this area, you will be able to view the unit's **Work Orders** as well as add new ones:

The unit's Work Orders will be sorted in **Pending**, **Active** and **Completed** status.

The main view will be **Active**. Work Orders marked as **Critical** will be positioned at the **top** of the list.



You will **not** be able to modify the unit's Work Orders

screen. Once added, work orders will be "closed" to modification.

Work C	orders		=
Q Search W	ork Orders		
	Beach Paradis	se	
PENDING (8)	ACTIVE (16)	COMPLETED	(0)
Alarms W.O. # 9738814		>	
Food Diants			
W.O. # 9734185 Priority: N/A		>	
Alarms W.O. # 9724571		>	
Priority: N/A			
Alarms W.O. # 9698338		>	
Priority: N/A			
Food Dianto			_

FIGURE 10: WORK ORDERS

Add Work Order

You can also add work orders.

The process to Add a Work Order is simple (Figures 11 - 16)

- 1. Enter a **Title**.
- 2. Select a **Priority**.
- 3. Enter a **Description**.
- 4. Add photos if required.
- 5. Select [Create Work Order] and confirm.



FIGURE 146: VIEW CONFIRMATION

FIGURE 15: CONFIRM DETAILS

FIGURE 14: CREATE WORK ORDER

Reports

By accessing the **Reports** area, you will have access to the following:

3:56		.ıll 🗢 🛃
く Back	Reports	=
	Bay Brook Bungalow	
	Month End Statement	>
-00	Profit and Loss	>
E	Summary Report	>
*	Maintenance Inspection	>
	1099/1042 Generated Repo	rt >
	1099/1042 Year End Report	>
Decemps 1		

FIGURE 16: REPORTS MENU



Note: The Month End Statement will always show in this area. Depending on our system setup, other reports may not be available.

Month End Statement

- 1. Selecting this tab will show all the month end statements available for the unit
- 2. Select a statement to view (Figure 18 & 19)..

Back	Month End Statement		OWNER STATEMENT	
	Bey Breek Dynadowy			Happy Stays - Migual 555 Scott-date, AZ 85251
	Bay Brook Bungalow		Deer Valley Lookout 18	APPROVE
/01/201	21 - 11/30/2021	>	Vour account summary Rental Activity: From 05801/2019 Period	Y
	1,00,2021	· · ·	Balance as of 09/01/2019 \$0.00	
/20	21 - 10/31/2021	>	Payment Received \$0.00	\$0.
			Gross Reservation Revenue \$0.00	\$0.
			Less Management Commission \$0.00	\$0.
			Owner Charges/Expenses \$0.00	\$0.
			Owner Held \$0.00	
			Owner Account Balance \$0.00	
			Balance Due to Owner \$0.00	\$0
			Payments To Owner \$0.00	\$0.
			Balance as of 09/30/2019 \$0.00	
			Your Payment of \$0.00 has been processed.	
			Reservations	
			Res #/Type Guest Start End Nights Gross Rent Mgmt	Comm Net Amo
			TOTAL 2 54.00	\$0.00 \$0
			* This reservation carries over into the next statement or carried over from a previous statement.	\$0.00
			Owner Payments/Additional Owner Income	
			Date Description	Amo
			TOTAL	50
			Owner Charges/Expenses	
			Posted Date Type Description	W.O# Exper
			Posted Date Type Description 107AL SAID OWNER	W.O # Expension
			Posted Date Type Description TOTAL PALO DATE SOLUCIONER SOLUCIONER SOLUCIONER	W.O # Exper
			Posted Date Type Description TCTAL PAID OWNER SCHEDULED PAYMENTS Owner Held	W.O.# Expe 50 50 50
			Posted Date Description TOTAL TOTAL PAD CONNER SCHEDURED PAYMENTS Owner Hold Owner Works Feestpoten Vender	W.O # Expen
			Posted Date Type Description TOTAL Fill Or WHER Fill Or WHER Schiedbulled Payment Held Fill Or WHER Fill Or WHER Owner Held Bescription Wender More ToTAL Control or WHER Fill Or WHER	W.O # Expension 50 50 sice # Amo 50 50
			Posted Date September Security/Security Security	W.O.# Experi- 50 50 50 50 50 50 50 50 50 60 50
			Posted Date Type Description TOTAL F F SCHEDULED PAYMENTS F F Owner Hold Bescription Invest TOTAL Vender Invest Dottack Reserve (Recommended Balance \$0.00) Description Invest Description Description Invest Invest	W.O.# Expendence 31 31 50 31 50 4 50 4 50 4 50 4 50 4 50 4 50 4 50 4 50 4 50 4 50 4 50 4 50 4 50 4 50 4

Profit and Loss

This report shows income and expenses by unit, by date range $(\mbox{Figures } 20\mbox{ - } 22)\,.$

1. Select the [Get Report] to generate the report.

2. Select the [Download Pdf] to download the report in pdf format.

The report will include reservation data, gross room revenue, management commission, and the date, type, description, and amount of expenses. Also considered as Net Income.



Summary Report

- 1. Selecting this tab will show options to generate the report.
- 2. Choose to generate a summary report by reservation check-in, check-out, or creation date (Figure 24).
- 3. Select the date range and [Get Report] (Figure 25).

This report will include the details of reservation type, date of arrival, number of nights, number of guests, rent, and owner commission.



Maintenance Inspection

Maintenance inspections can be generated for a specific date range.

- Selecting [Get Report] will show details of maintenance inspections created within that date range for the unit (Figure 26).
- 2. Select the download icon to generate and view the details of the maintenance inspection (Figure 27).



1099/1042 Generated Report

Select this tab to generate the 1099/1042 report



FIGURE 28: 1099/1042 GENERATED REPORT

1099/ 1042 Year End Report

Select this tab to generate the 1099/1042 year-end report.

÷	1099/1042 Year Ei	nd Report
Bay Repo Creat Proce Dates	Brook Bungalow rt #: 301385 ed: 12/08/2021 16:37:51 essor: Roxana Serrano s: 01/01/2021 12/31/2021	>
FIGUR	E 29: 1099/1042 YEAF	R-END REPORT

Service Tasks

Selecting this tab will show options to toggle and view [**Open**], [**Closed**] and [**Deleted**] (**Figure 31**) service tasks. You can also slide an Open task to choose the **Close** or **Delete** options (**Figure 32**). Slide a Closed task to choose **Activate** or **Delete** options (**Figure 33**).



Steps to Communicate with PMC for a Service Task

- 1. Select the task to view the history and details of communications with the PMC regarding this task
- 2. Send response using the message window at the bottom.

← Service Ta	ask #17739 ≡
Bay Bro	ok Bungalow
	Katy:
	Need to block property for a couple weeks for repairs
	12/14/2021 16:40
Roxana:	
Sure! Let us know dates so we can b them for you. Tha	the lock nks!
12/14/2021 16:42	
	Katy:
	Jan 1st to Jan 5th 2022 please
	12/14/2021 16:43
Send new message	1
	= //

Steps to Add a Service Task

1. Select the [Add Service Task] button (Figure 34)

FIGURE 33: MESSAGES AND RESPONSE

- 2. Enter a Title for the task (Figure 35).
- 3. Enter a Description for the task.
- 4. Select [Create Service Task]

\leftarrow Service Tasks \equiv	\leftarrow Create Service Task \equiv
Bay Brook Bungalow ⊙	Bay Brook Bungalow
Q Search Service Tasks	🎘 Title
OPEN (1) CLOSED (1) DELETED	() Description
Task #: 17739 Need to schedule repairs > 12/14/2021 04:40 PM	
ADD SERVICE TASK	CREATE SERVICE TASK
FIGURE 34: SERVICE TASK SCREEN	FIGURE 35: ADDING A SERVICE T.

Attachments

This tab provides an easy method to share property documents with the PMC.

Steps to Add Attachments

- 1. Select the [Add Attachment] button
- 2. Select [Add File] to upload the document.
- 3. Select the [Save Attachment] to save the document.



FIGURE 378: ADD ATTACHMENT SCREEN

FIGURE 389: UPLOAD FILE

Steps to Download Attachments

- 1. Select the arrow [>] next to the document details.
- 2. Save the document.

More info

The More Info area presents an overview of the unit's enabled Additional Property Fields.

MAKE RESERVATION

This option follows the same steps as provided under the section **Steps to make Reservation** (CTRL + Click the highlighted text to follow the link)

NEWS The **News** area presents important information from us.

News	67% 🛱
News manager test	>
News example #1 ☐ 12/03/2019	>

FIGURE 39: NEWS SCREEN

CONTACT US

In the **Contact Us** area you will be able to view our contact information:





In the **SETTINGS** area you will be able to view your own account information as well as **Log Out** of the App:

4:02	🗢 💽
③ Settings	Ξ
Bay Brook Bungalow	
katybug@email.com	
First Name	
Katy	
Last Name	
Brooks	
Company	
Company	
Add. Email #1	
Additional Email #1	
Add. Email #2	
Additional Email #2	
New Password	
New Password	
Log out	
Owner X Version 2.30	
© Copyright Streamline Vacation Software	Rental
GURE 41: LOG OUT SCREEN	



Note: Get in touch with us if you notice any information that needs to be changed.