# Logo Description automatically generated

# Owner X: Mobile and Desktop Versions

Table of Contents

[Owner X: Mobile and Desktop Versions 1](#_Toc126934398)

[How to use this guide 2](#_Toc126934399)

[GETTING STARTED 1](#_Toc126934400)

[App download and installation 1](#_Toc126934401)

[Owner desktop access 1](#_Toc126934402)

[Logging In 2](#_Toc126934403)

[DASHBOARD 2](#_Toc126934404)

[Dashboard Menu Options 4](#_Toc126934405)

[Reservations 4](#_Toc126934406)

[Availability Calendar 4](#_Toc126934407)

[Work Orders 6](#_Toc126934408)

[Reports 9](#_Toc126934409)

[Service Tasks 14](#_Toc126934410)

[Attachments 16](#_Toc126934411)

[More info 17](#_Toc126934412)

[MAKE RESERVATION 18](#_Toc126934413)

[APPLY COUPONS AND DISCOUNTS 18](#_Toc126934414)

[NEWS 18](#_Toc126934415)

[CONTACT US 19](#_Toc126934416)

[SETTINGS 19](#_Toc126934417)

## GETTING STARTED

## App download and installation

The app is available for download for Apple and Android devices under the name **Owner X**.

Shape

Description automatically generated with medium confidenceA black and white sign

Description automatically generated with low confidence

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/

Graphical user interface

Description automatically generated with medium confidence

FIGURE 1: LOGIN SCREEN

## 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.

|  |  |
| --- | --- |
| Graphical user interface, application, Teams  Description automatically generated  Figure 2: App view | Graphical user interface  Description automatically generated  Figure 3: Desktop module 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 icon on any of the screens will open the Main Menu:

## Dashboard Menu Options

### Reservations

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

|  |  |
| --- | --- |
| Graphical user interface, text, application, email  Description automatically generated  Figure 4: dashboard reservations | Graphical user interface, text, application  Description automatically generated  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.

#### A picture containing table Description automatically generatedSteps 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

**.**

|  |  |  |
| --- | --- | --- |
| Graphical user interface  Description automatically generated with medium confidence  Figure 7: check-in and check-out dates | Graphical user interface, application  Description automatically generated  Figure 8: reservation details | A picture containing chart  Description automatically generated  Figure 9: confirm reservation |

### 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.

 **Note:** You will **not**be able to modify the unit’s Work Orders from this

Graphical user interface, application

Description automatically generated screen. Once added, work orders will be “closed” to modification.

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.

|  |  |  |
| --- | --- | --- |
| Graphical user interface, text, application, chat or text message  Description automatically generated  Figure 11: enter title | Graphical user interface, application  Description automatically generated  Figure 12: select priority | Graphical user interface, application  Description automatically generated  Figure 13: add description |
| Graphical user interface, application, Teams  Description automatically generated  Figure 16: view confirmation | Graphical user interface, text, application, chat or text message  Description automatically generated  Figure 15: confirm details | Chart, line chart  Description automatically generated with medium confidence  Figure 14: create work order |

### Reports

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

Graphical user interface, application

Description automatically generated

Figure 17: 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**)..

|  |  |
| --- | --- |
| A picture containing shape  Description automatically generated  Figure 18: month end statement screen | A screenshot of a cell phone  Description automatically generated  Figure 19: month end statement details |

#### Profit and Loss

This report shows income and expenses by unit, by date range (**Figures 20 – 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.

|  |  |  |
| --- | --- | --- |
| Graphical user interface, application  Description automatically generated  Figure 20: profit and loss screen | Table  Description automatically generated  Figure 21: profit and loss summary | Table  Description automatically generated  Figure 22: profit and loss report |

#### 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.

|  |  |  |
| --- | --- | --- |
| Graphical user interface, text, application  Description automatically generated  Figure 23: summary report screen | Graphical user interface, text, application  Description automatically generated  Figure 24: summary report settings | Graphical user interface, application  Description automatically generated  Figure 25: summary report |

#### Maintenance Inspection

Maintenance inspections can be generated for a specific date range.

1. 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**).

|  |  |  |
| --- | --- | --- |
| Graphical user interface, application  Description automatically generated  Figure 26: maintenance inspection screen | Graphical user interface, application  Description automatically generated  Figure 27: maintenance inspection report summary | Graphical user interface, text, application, email  Description automatically generated  Figure 28: maintenance inspection report details |

#### 1099/1042 Generated Report

Graphical user interface, application

Description automatically generatedSelect this tab to generate the 1099/1042 report

Figure 29: 1099/1042 generated report

#### 1099/ 1042 Year End Report

Graphical user interface, application, Word

Description automatically generatedSelect this tab to generate the 1099/1042 year-end report.

Figure 30: 1099/1042 year-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**).

|  |  |  |
| --- | --- | --- |
| Graphical user interface, text, application  Description automatically generated  Figure 31: service tasks toggle options | Graphical user interface, application  Description automatically generated  Figure 32: open tasks slide options | Graphical user interface, application  Description automatically generated  Figure 33: closed tasks slide options |

#### 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.

Graphical user interface, text, application, chat or text message

Description automatically generated

Figure 34: messages and response

#### Steps to Add a Service Task

1. Select the [**Add Service Task**] button (**Figure 34**)
2. Enter a Title for the task (**Figure 35**).
3. Enter a Description for the task.
4. Select [**Create Service Task**]

|  |  |
| --- | --- |
| *Graphical user interface, application  Description automatically generated*  Figure 35: service task screen | *Graphical user interface, text, application, chat or text message, email  Description automatically generated*  Figure 36: adding a service task |

### Attachments

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

#### Steps to Add Attachments

1. Select the [**Add Attachment**] button

Figure 37: Add Attachment button

1. Select [**Add File**] to upload the document.
2. Select the [Save Attachment] to save the document.

|  |  |
| --- | --- |
| *Graphical user interface, application  Description automatically generated*  Figure 38: add attachment screen | *Graphical user interface, text, application, chat or text message  Description automatically generated*  Figure 39: upload file |

#### Steps to Download Attachments

1. Select the arrow [>] next to the document details.
2. *Graphical user interface, text, application, chat or text message

   Description automatically generated*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)

## APPLY COUPONS AND DISCOUNTS

Follow these steps to apply coupons and discounts when making a reservation.

1. Select [**Make a Reservation**].
2. Select the unit.
3. Select the reservation dates.
4. Click on the dropdown menu under **Coupons and Discounts** tab.
5. Apply the coupon/ discount.

Graphical user interface, application

Description automatically generated

## NEWS

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

A screenshot of a cell phone

Description automatically generated

Figure 40: news screen

## CONTACT US

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

Graphical user interface, text, application, email

Description automatically generated

Figure 41: contact us screen

## SETTINGS

In the **SETTINGS** area you will be able to

1. View your own account information.
2. Choose to view your taxes electronically.
   1. Toggle on [**Enable this to opt in to see your taxes electronically**]
3. **Log Out** of the App.

Graphical user interface, text, application, chat or text message

Description automatically generated

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