

Blue Moon Mission Control New Customers

July 2018



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Overview

Blue Moon users can currently manage existing properties and portfolios in Mission Control; this allows users to add new property IDs to a property account, change the account type (Single Property, Multi-Property, Phased Property), add new property accounts to a portfolio, and create a new portfolio from scratch.

Properties > Milky Way Management

< Properties

Hubble Heights

Property ID #1234567 ACTIVE \$

Property Details

Hubble Heights 701 units

Property Name	Database Type	Total Units
Hubble Heights	Apartment	701

Address

4437 Pluto Road

Address 2 (optional)

Suite 441

Zip Code	City	State
77024	Houston	Texas

This is the main mailing address for Hubble Heights.

Phone Number	Fax Number
(281) 113-9930	(281) 112-0029

This is the main phone number for Hubble Heights. This is the main fax number for Hubble Heights.

NAA Member #

12345678

Single

Hubble Heights

Property ID

PORTFOLIO

Hubble Heights

milkywayr

info@milky

+1 (281)

+1 (281)

STICKY NO

No notes

Associat

NAA

New Property

Property Name

Hubble Heights Properties

Legal Name

Hubble Heights Properties II, Ltd

Database Type	Total Units
Apartment	80

Address 1	Address 2 (optional)
7019 Solar Moon Parkway	Suite 201

Zip Code	City	State
77024	Houston	Texas

Country

United States of America

☒ Copy to account mailing address

Phone Number	Fax Number
(281) 113-9930	(281) 112-0029

☒ Copy to account phone number ☒ Copy to account fax number

Property ID	Association ID
12345678	12345678

Cancel Save

Add Property

Users can add new properties to existing property accounts by clicking the *Add Property icon* on the Property Details card. Clicking the icon opens the *New Property Modal*.



Changing Property Type

If the existing account is a *Single Property* account and the user clicks to add a new property, the *Change Property Type* dialog pops up and the user is required to switch to a *Multi* or *Phased Property* account before they can access the *New Property Modal*.

Change Property Type

This account is currently a Single Property account. To add a new property you will have to switch to either a Multi-Property or a Phased Property Account.

Switch to Multi-Property

Switch to Phased Property

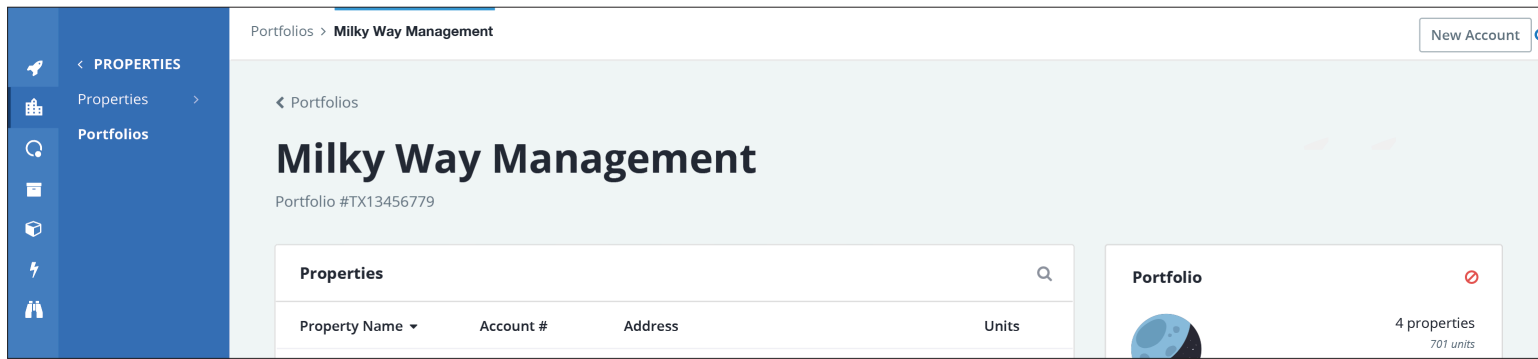
Cancel

New Property Modal

The system will auto-assign the next available Property ID to the new property. If the user DOES NOT save the new property, the property ID displayed is still available. Only the fields required for the selected property type/database type combination will be displayed (*See below: residential or condo will only ask for Total Units and Association ID*).

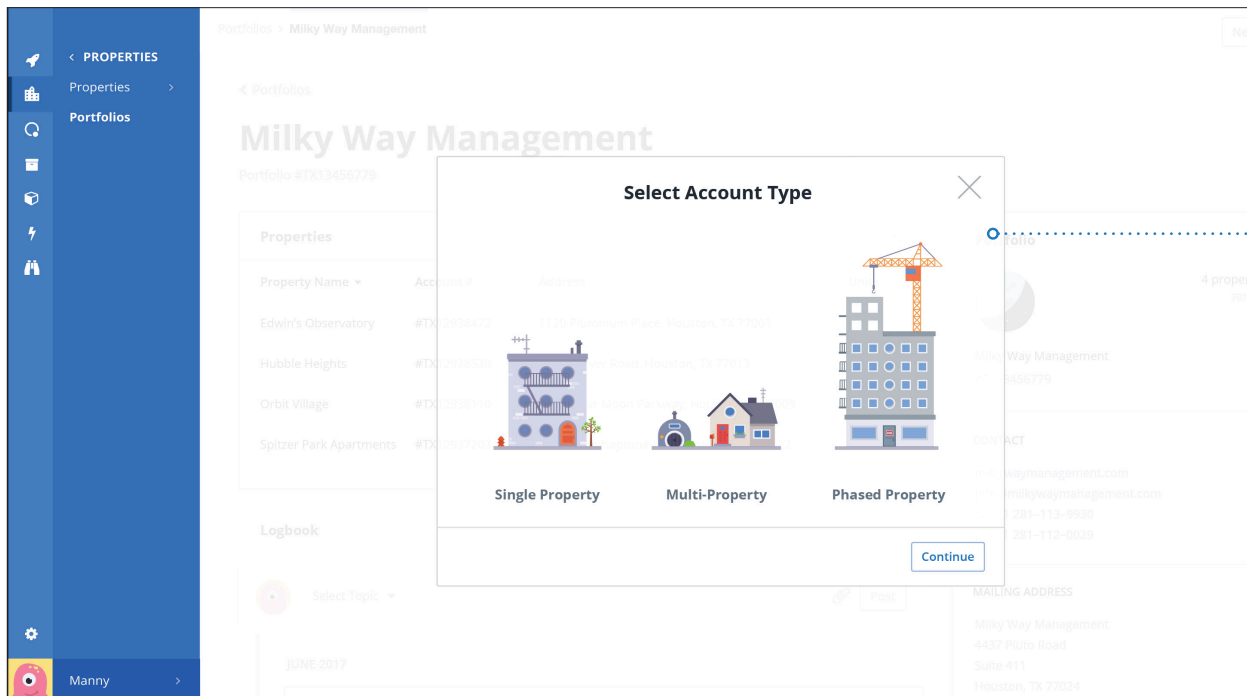
Database Type	Total Units	Property ID
Residential		12345678

Association ID



Add Account

Users can add new property accounts to existing portfolios by clicking the *New Account* button on the Portfolio Profile. Clicking the button opens the *New Account Modal*.



New Account Modal: Select Account Type

The first step of creating a new account is always selecting the account type. The account type will determine what information to collect when setting up the new account.

Association Details

Once an account type is selected (step 1), the association information is set for the new account (step 2). This step is the same for all three Property Types.

New Single Property Account

Association

Property

Account

Billing

Association

NAA

State

California

Local Affiliate

Apartment Association of Greater Los Angeles

LOCAL AFFILIATE CONTACT

contact@AAGLA.com

+1 281-113-9930

Cancel

Back

Continue

Property Details

This step (step 3) differs for each account type (see page 7 for Multi and Phased accounts). The Property ID is auto-assigned.

New Single Property Account

Association

Property

Account

Billing

Property Name

Property ID

12345678

☒ Copy to Legal Name and Account Name

Legal Name

Association ID

Copied from Property Name

Database Type

Total Units

Select...

Address 1

Address 2 (optional)

Zip Code

City

State

Select...

Country

Select...

☒ Copy to account address

Phone Number

Fax Number

☒ Copy to account phone number

☒ Copy to account fax number

Email

Cancel

Back

Continue

Account Details

Account info is entered on step 4. Some of these fields can be pulled in from previous steps; if they are, it is noted where the data originated from. The user CAN overwrite copied values.

New Single Property Account

Association

Property

Account

Billing

The following information prints on legal documents inside the Forms Program.

Account Name

Copied from Property Name

Address 1

Address 2 (optional)

Zip Code

City

State

Select...

Country

Select...

Copied from Property Address

Phone Number

Fax Number

Copied from Property Phone Number

Cancel

Back

Continue

Billing Details

The final step (step 5) collects billing information for the account.

New Single Property Account

Association

Property

Account

Billing

☒ Same as Physical Address

Hubble Heights

4437 Pluto Road, Suite 411

Houston, TX 77024

United States

Billing Email

Mail Code

☒ Same as Property Contact Email

Renewal Date

6/30/2019

☒ Enrolled in Paperless Billing

☐ Tax Exempt

Cancel

Back

Save

New Multi-Property Account

Association

Property

Account

Billing

1

Hogwarts Heights

2

Hogsmeade Apartments

Delete

3

Olivander's Landing

Database Type

Select...

Total Units

Property ID

12345678

Property Name

Olivander's Landing

Association ID

☒ Copy to Legal Name and Account Name

Legal Name

Address 1

Address 2 (optional)

Zip Code

City

State

Select...

Country

Select...

☒ Copy to account address

Phone Number

Fax Number

☒ Copy to account phone number

☒ Copy to account fax number

Email

Add Another Property

Cancel

Back

Continue

Property Details: Multi and Phased Accounts

What differs a Multi or Phased account from a Single property account is the amount of information collected on the property tab. Single Property accounts will only have one (1) set of property data to collect; Multi and Phased accounts will have two (2) or more.

Each property on a Multi or Phased property account is assigned a new property ID; the user can add an infinite number of properties to an account.

< PROPERTIES

Properties >

Portfolios

Portfolios

Manage the Blue Moon portfolios.

New Portfolio

Export

Filter portfolios

CSV

Excel

Portfolio Name	Portfolio Number	Mailing Address	Status
<input checked="" type="checkbox"/> Asteroid Acres	#TX30077104	1120 Plutonium Place, Houston, TX 77001	Active

Add Portfolio
New portfolios are added by clicking the *New Portfolio* button on the *Portfolios Landing Page*.

< PROPERTIES

Properties >

Portfolios

Portfolios > New Portfolio

New Portfolio

1 Portfolio

Portfolio Name

Contact Information

Phone Number

Fax Number

Website

Email

Mailing Address

Address 1

Address 2 (optional)

Zip Code

City

State

Select...

Country

Select...

Billing Address

Time to break ground

Let's build a new portfolio

New Portfolio Wizard
Clicking the New Portfolio button on the *Portfolios Landing Page* opens the *New Portfolio Wizard*.

1

Portfolio

Portfolio Name

Contact Information

Phone Number

Fax Number

Website

Email

Mailing Address

Address 1

Address 2 (optional)

Zip Code

City

State

Select...

Country

Select...

Billing Address

☒ Same as Mailing Address

Continue

2

Accounts

3

Done

Step 1: Portfolio Details

A new portfolio is created, assigned a portfolio number, and starts auto-saving after the portfolio name is entered. If the user navigates away from the *Create New Portfolio* wizard after the name is entered, the portfolio becomes search-able in the *Portfolio Table*.

Clicking *Continue* closes the *Portfolio panel* and opens the *Accounts Panel*.

Portfolio

2

Accounts

1

2

3

Add Account

We'll walk you through creating an account.

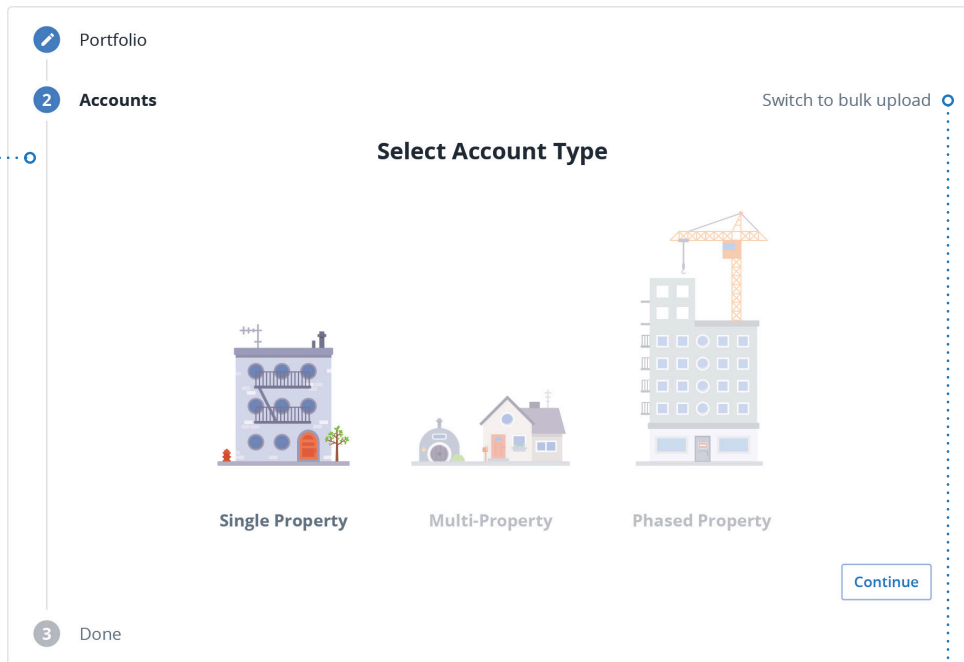
3

Done

Upload a CSV to add multiple accounts.

Step 2: Accounts

The user can add accounts manually or use the bulk upload feature create multiple accounts at once. (See page 10)



Manually Add Accounts

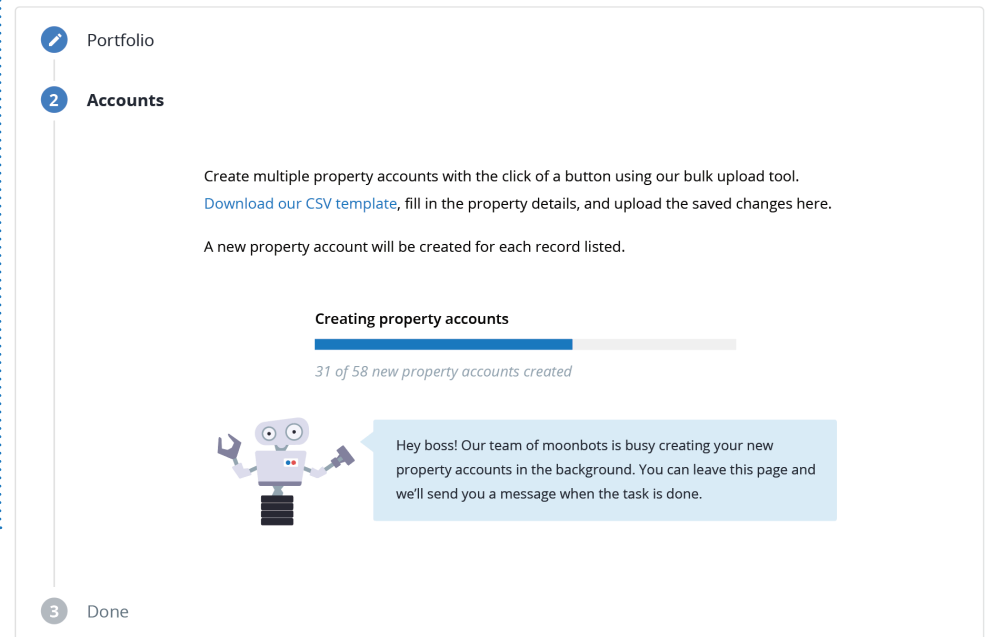
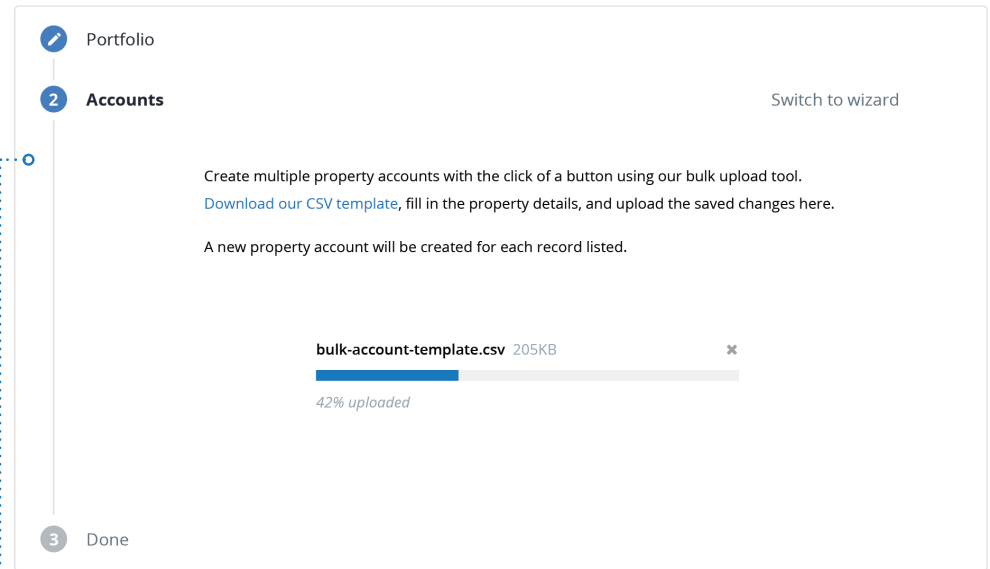
If the user chooses to manually add accounts they go through the same account set up wizard that is used to add a new account to an existing portfolio (*see page 5*).

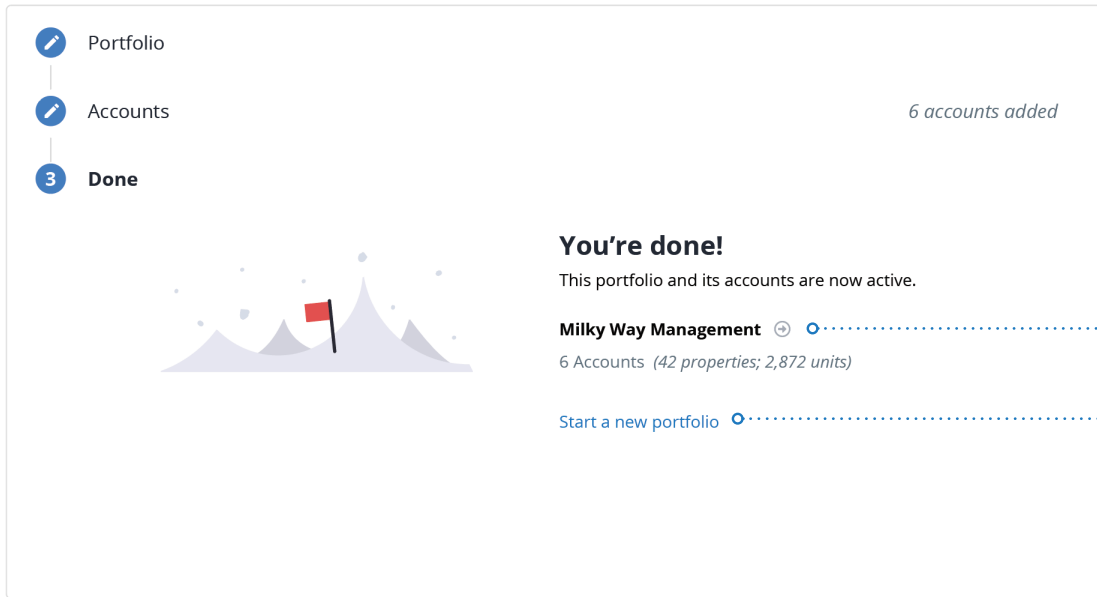
Switch to Bulk Upload

If the user HAS NOT started a new account manually, they can switch to the bulk upload.

Bulk Upload

Users can upload a CSV to add multiple accounts at once to a new portfolio. Once the CSV is saved the accounts are created in the background.





Step 3: Done

After accounts are added the user is done with the wizard.

A summary of the portfolio they just created is shown.

Go to Portfolio

Click to navigate to the newly created portfolio.

Start a New Portfolio

Go back to step 1 and start all over.