

e-StatePortal User Manual Book

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1. User's access pages:

1.1. Login.

The user can login to the following sites:

- www.KWA.co.za
- <u>www.Verrisig.co.za</u>
- <u>www.eStatePortal.co.za</u>

When you login into one of the website you will see the homepage. Enter the username and password and submit the information. If your information is correct the system will display eStatePortal user application interface. If your information is incorrect the error message will be displayed.

1.2. Estate.

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How to "View Residents records"?

Steps	Actions
1	Make sure that you are already login into the system

2	Select "estate" menu from the menu list.
3	Select "Residents" from the sub menu list.

How to "Edit your own profile"?

Steps	Actions
1	Make sure that you are already login into the system
2	Select "estate" menu from the menu list.
3	Select "Edit own profile" from the sub menu list.
4	Edit the information
5	Click "Save changes" to submit the updated information.

How to "View own profile"?

Steps	Actions
1	Make sure that you are already login into the system
2	Select "estate" menu from the menu list.
3	Select "View own profile" from the sub menu list.

How to "Add Dependent"?

Steps	Actions
1	Make sure that you are already login into the system.
2	Select "estate" from the menu list.
3	Select "View own profile" from the sub menu list.
4	Select "My dependents" from the top menu of the page.
5	Select "Create New Dependent" from the top page.
6	Enter user information
7	Click "Submit" to submit the information.

How to "Edit Dependent"?

Steps	Actions
1	Make sure that you are already login into the system.
2	Select "estate" from the menu list.
3	Select "Resident" from the sub menu list.
4	Click "Edit" next to your dependent you want to edit.
	*you can edit you own dependent only
5	The system displays the edit page.

[COMPANY CONFIDENTAIL]

6	Edit the information you want to edit.
7	Click "Submit" to submit the information.

How to "Remove Dependent"?

Steps	Actions
1	Make sure that you are already login into the system.
2	Select "estate" from the menu list.
3	Select "Resident" from the sub menu list.
4	Click "Remove" next to the dependent you want to remove.
5	Click "OK" to confirm the message.

1.3.Document Repository categories.

e-State Portal - Sou	th Africa's leading pr	operty management	system - Mozilla F	irefox						
e <u>E</u> dit <u>V</u> iew Hi <u>s</u> tor	y <u>B</u> ookmarks <u>T</u> ools	Help								-0
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e-State Portal - South	Affic	e Portal - South A 🔛	Verresig - News	- Gallery	Ze Mai	il.com - the bes	t persona 🔝	8 dell ser	ver 1850 - Google S [1
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My Accounts	Estate Public Folder E	state Private Folder Use	ers Folder Stands Fo	lder					🥑 кероп-А-Вид	
Estate	List Estate Publ	ic Sub Folder							Current Information	
Communication	Sub Folder	Group Name					Action		08 May 2008 14:06 - Estate albums added: Gif	
Shopping	News	Public					1 documents Ec			_
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How to "Use Document Repository"?

Steps	Actions

[COMPANY CONFIDENTAIL]

e-StatePortal User Manual Book For Resident/Owners role

1	Make sure that you are already login into the system.
2	Select "estate" that you will create categories for from "estate quick login".
3	Select "document" menu from the menu.
4	Select "Document repository" from sub menu list.

1.5.1. Manage sub folders.

How to create sub folder for "Users"?

Steps	Actions
1	Select "User folder".
2	Select "Add New Folder" option.
3	Type name of the sub folder.
4	Click "Submit" to submit the sub folder name.

1.5.2. Document Repository.

* (Note: The folder which will be created on "Estate Public Folder will be available to everyone on estate website. The folder that will be created on "Estate Private Folder" will be available only to the user's that have access login into e-StatePortal and they will need to login into e-StatePortal to view the folders under this option).

How to attach a document to "Users"?

Steps	Actions
1	Select "Users folder".
2	Select the category you want to attach the document to or select "Add New document".
3	Select the users that will see the document.
4	Type the title of the document.
5	Browse to the document you want to attach.
6	Type the comment you want to add to the document.
7	Click "Submit" to submit the information.

How to view documents to "Estate Public"?

Steps	Actions
1	Click the documents option on actions next to the category you want to view.
2	Click "view document" next to the document name you want to view.

How to view documents to "Users"?

Ste	eps	Actions
1	L	Click the documents option on actions next to the category you want to view.
2	2	Click "view document" next to the document name you want to view.

How to view documents to "Estate Private"?

Steps	Actions
1	Click the documents option on actions next to the category you want to view.
2	Click "view document" next to the document name you want to view.

1.4.Create helpdesk categories.

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How to "log a ticket"?

Steps

Actions

[COMPANY CONFIDENTAIL]

e-StatePortal User Manual Book For Resident/Owners role

1	Go to Helpdesk menu.
2	Select "logged tickets" from the sub menu list.
3	Select New tickets to the top left side of the page.
4	Type the subject of the ticket.
5	Type the description of the ticket.
6	Select the priority of the ticket.
7	Select a category from helpdesk categories.
8	Select the status of the ticket.
9	Click "Submit" to submit the information.

How to "View logged tickets"?

Steps	Actions
1	Go to Helpdesk menu.
2	Select "All Tickets" from the sub menu list.

How to "View my tickets (TODO)"?

Steps	Actions
1	Go to Helpdesk menu.
2	Select "View my tickets (TODO)" from the sub menu list.

How to "View pending tickets"?

Steps	Actions
1	Go to Helpdesk menu.
2	Select "View Pending" from the sub menu list.

How to "View Closed tickets"?

Steps	Actions
1	Go to Helpdesk menu.
2	Select "View closed" from the sub menu list.

How to "View Accepted tickets"?

Steps	Actions
1	Go to Helpdesk menu.
2	Select "View accepted" from the sub menu list.

1.5. My Services.

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How to "Apply for Services"?

Steps	Actions
1	Go to "My Service" menu.
2	Click "Manage Service" sub menu.
3	Select type of service
4	Click "Add More Service" from Manage Service page.
5	Select a Service Provider and click continue.
6	Select the services and click "Continue".
7	Select type of payment option.
8	Accept terms and conditions.
9	Click "Submit" to confirm the application.

Types of payment methods

The Debit Order Option

• If you select this option, the system will display "Bank Detail" page where you will be required to enter your Bank Details, read and accept the Terms and Conditions and click the "Submit" button to submit the information. The system will create a debit order form with terms and conditions that the you will be required to download, sign and fax it to the ATEC helpdesk

Credit Card Option

• If you selects this option, the system will display the Credit Card page with the credit card information; explaining how to pay your account by using this option. You will be required to

accept Administration fee, read and accept Terms and Conditions and click the "Submit" button to submit the information.

Electronic Funds Transfer

• If you select this option, the system will display the Electronic Funds Transfer page with the EFT information explaining how to pay using this option. You will be required to accept Administration fee, read and accept Terms and Conditions and click the "Submit" button to submit the information.

1.6. My Accounts.

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How to "View Accounts"?

Steps	Actions
1	Go to "My Account" menu.
2	Click "View Accounts" sub menu.

How to "View my invoices"?

Steps	Actions
1	Go to "My Account" menu.
2	Click "View Accounts" sub menu.
3	Click "My invoices" at the top of the page.
4	Select the account
5	Click "view Invoices".
6	Click "Download Invoice" next to the invoice you want to view.

How to "View my account details"?

Steps	Actions
1	Go to "My Account" menu.

2	Click "View Accounts" sub menu.
3	Click "My Account Detail" option at the top of the page.

How to "View my service information"?

Steps	Actions
1	Go to "My Account" menu.
2	Click "View Accounts" sub menu.
3	Click "View Service" next to the service you want to view.

How to "View my telephone summary data"?

Steps	Actions
1	Go to "My Account" menu.
2	Click "View Accounts" sub menu.
3	Click "View Service" next to telephone service.

How to "View my telephone detailed data"?

Steps

Actions

[COMPANY CONFIDENTAIL]

e-StatePortal User Manual Book For Resident/Owners role

1 Go to "My Account" menu. 2 Click "View Accounts" sub menu. 3 Click "View service" next to telephone service. 4 Click "View Itemised Billing Report" at the top of the pop up window. 5 Select month option. 6 Select week start date option.		
3 Click "View service" next to telephone service. 4 Click "View Itemised Billing Report" at the top of the pop up window. 5 Select month option. 6 Select week start date option.	1	Go to "My Account" menu.
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How to "View my internet information"?

Steps	Actions
1	Go to "My Account" menu.
2	Click "View Accounts" sub menu.
3	Click "View Service" next to the internet service option.

How to "Upgrade my internet package"?

(Note: The internet package will be upgraded immediately)

St	teps	Actions
	1	Go to "My Account" menu.

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e-StatePortal User Manual Book For Resident/Owners role

2	Click "View Accounts" sub menu.
3	Click "View Service" next to the internet service option.
4	Click "Upgrade Package" at the top of the page.
5	Select that package from "Upgrade the package to" option.
6	Accept terms and conditions.
7	Click "Continue" to continue into the information page.
8	Click "Continue" to finish the upgrade process.

How to "Downgrade my internet package"?

(Note: The internet package will be downgraded at the end of the current month if you are already usage the current internet package)

Steps	Actions
1	Go to "My Account" menu.
2	Click "View Accounts" sub menu.
3	Click "View Service" next to the internet service option.
4	Click "Downgrade Package" at the top of the page.
5	Select that package from "Downgrade the package to" option.
6	Accept terms and conditions.
7	Click "Continue" to finish the process.

How to	"Top u	p my	internet	package"?
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Steps	Actions
1	Go to "My Account" menu.
2	Click "View Accounts" sub menu.
3	Click "View Service" next to the internet service option.
4	Click "Top up Package" at the top of the page.
5	Select that package from "Top up package to" option.
6	Select type of payment.
7	Follow the payment method process you've just selected.

How to "View my internet usage history"?

Steps	Actions
1	Go to "My Account" menu.
2	Click "View Accounts" sub menu.
3	Click "View Service" next to the internet service option.
4	Click "Internet Usage History" at the top of the page.

How to "View my previous month internet usage history"?

Steps	Actions
1	Go to "My Account" menu.
2	Click "View Accounts" sub menu.
3	Click "View Service" next to the internet service option.
4	Click "Internet Usage History" at the top of the page.
5	Click "View Monthly Internet Report" at the top of the page.

How to "View my previous month daily internet usage history"?

Steps	Actions
1	Go to "My Account" menu.
2	Click "View Accounts" sub menu.
3	Click "View Service" next to the internet service option.
4	Click "Internet Usage History" at the top of the page.
5	Click "View Monthly Internet Report" at the top of the page.
6	Click "View Details Report" next to the moth you want to view.

1.7. Communication.

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Actions

How to "View latest news"?

Steps	

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1	Go to Communication menu
2	Select "News" option from the sub menu list.
3	Click "Latest news" at the top of news page.

How to "View News Archives"?

Steps	Actions
1	Go to Communication menu
2	Select "News" option from the sub menu list.
3	Click "News Archive" at the top of news page.

How to "View a poll"?

Steps	Actions
1	Go to Communication menu
2	Select "View Poll" option from the sub menu list.

How to "View frequently Asked Question (FAQs"?

Steps	Actions
1	Go to Communication menu
2	Select "FAQs" option from the sub menu list.
3	Select the category you want to view.
4	Select the question you want to view its answer.

1.8. Lifestyle.

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How to "View facilities"?

Steps	Actions
1	Go to Lifestyle menu.
2	Select "View Facility" option from the sub menu list.

How to "Book a Facility"?

Steps	Actions
1	Go to Lifestyle menu.
2	Select "View Facilities" option from the sub menu list.
3	Click "Booking" next to the facility you want to book.
4	Select date, click "Book now", select date, time of the facility and enter the occasion.
5	Click "Submit" to submit the information.

How to "View Manage bookings"?

Steps	Actions
1	Go to Lifestyle menu.
2	Select "My Bookings" option from the sub menu list.
3	Select "View" next to the booking you want to view.
4	Confirm the booking.

How to use "Gallery option"?

Steps	Actions
1	Go to Lifestyle menu.
2	Select "Gallery" option from the sub menu list.

How to use "Create New Album"?

Steps	Actions
1	Go to Lifestyle menu.
2	Select "Gallery" option from the sub menu list.
3	Click "Create New Album" albums page.
4	Enter the album name.
5	Click "Create" to create the album.

How to use "Edit Album"?

Steps	Actions
1	Go to Lifestyle menu.
2	Select "Gallery" option from the sub menu list.
3	Click your album name.
4	Click the album you want to edit.
5	Click "Edit Album Name" from album page.

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6	Edit the album name.
7	Click "Submit" to submit the information.

How to use "Share Album"?

Steps	Actions
1	Go to Lifestyle menu.
2	Select "Gallery" option from the sub menu list.
3	Click your album name.
4	Click the album you want to share.
5	Click "Share Album" from album page.
6	Select the users you want to share the album with from share page list.

How to use "Un-share Album/Edit shared List"?

Steps	Actions
1	Go to Lifestyle menu.

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2	Select "Gallery" option from the sub menu list.
3	Click your album name.
4	Click the album you want to edit shared list/un-share.
5	Click "Edit Share List" from album page.
6	Click remove next to the user name you want to remove to the shared list.

How to use "Make Album Public/Make Album Private"?

Steps	Actions
1	Go to Lifestyle menu.
2	Select "Gallery" option from the sub menu list.
3	Click your album name.
4	Click the album you want to make private/public.
5	Click "Make Public/Make Private" from album page.

How to use "Delete Album"?

Steps	Actions
1	Go to Lifestyle menu.
2	Select "Gallery" option from the sub menu list.
3	Click your album name.
4	Click the album you want to delete.
5	Click "Delete Album" from album page.
6	The system display message "Are you sure you want to delete this album".
7	Click "OK" to confirm the message.

1.9. e-Market.

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How to "Use Shopping Cart"?

Steps	Actions
1	Make sure that you are already login into the system
2	Select estate from "estate quick login".
3	Select "e-Market" menu from menu list.
4	Select "e-shopping" sub menu.
5	Accept "Terms and Conditions".
6	The system displays "Main Categories". Select the category you want to view
7	The system displays "Sub categories". Select the sub category you want to view.
8	The system displays products. Click "Add to cart" to the products you want to purchase.
9	Click "Checkout" if you are finished to do shopping.
10	The system displays all selected products, prices and total price. click "Payment".
11	The system display MyGate form for a user to enter credit card details.
	Click "Pay Now" to confirm purchase and payment.

How to "Empty shopping Cart"?

Steps	Actions
1	The system all the selected products to the cart.
2	Click "Empty Cart" at the top of shopping cart.

How to "Update Quantity Shopping Cart"?

Steps	Actions
1	The system displays all selected products to the shopping cart.
2	Click "QTY" box and type the quantity number you are looking for.
3	Click "Update" to confirm quantity number.

1.10. Downloads.

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How to "Download downloadable software"?

Steps	Actions
1	Make sure that you are already login into the system

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2	Select estate from "estate quick login".
3	Select "downloads" menu from menu list.
4	Select "download software" sub menu.
5	Click "download next to the software name you want to download".