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Administrative Portals

There are many different types of web portals that have been reviewed in previous articles in this web portal series. The first article touched on all the different portals available (*Opening Portals to Business*, April 2009), and the articles that followed focused on the most popular types: resident (*24-7 Customer Service*, May 2009), owner (*Connecting with the Investor*, June 2009), prospect (*Maximizing Occupancy*, August 2009), application (*Accelerating Leads to Leases*, September 2009), and payment (*Collecting Payments*, October/November 2009). In this article, we will discuss how you can configure and manage all of these portals through a special administrative portal.

WHAT IS AN ADMINISTRATIVE PORTAL?

An administrative portal provides a real-time view of the activity of the other portals to the property management company. This functionality is sometimes referred to as a "dashboard," providing key metrics about portal activity, but more importantly information about your business.

Some common dashboard items include:

- Logins by user by portal.
- Number of work orders, applications, and payments submitted.
- Most popular search criteria for finding units.
- Frequency chart of most viewed available units.

The administrative portal is also used to setup and change the way each portal operates. The functionality can range from changing the notification e-mail address to selecting the criteria by which properties are displayed in the prospect portal.

The "Your Current Prospect Portal Criteria" screen capture (*at right*) illustrates the degree of flexibility that can be provided. This screen allows the property manager to select from a number of ways a website visitor can find homes of interest to rent. The order and arrangement of these criteria can be changed through simple drop down options and navigation buttons.

A third use of the administrative portal is to manage the operation of the portals. An example of this would be to approve the registration of a portal user that had not been pre-approved.

USER AUTHENTICATION

It is important to control access to the portal functions. This can be as simple as checking that the user is a person rather than a machine when submitting an application. A common technique, CAPTCHA (Completely Automated Public Turing test to tell Computers and Humans Apart.), requires the user to enter a word or phrase contained in an image or audio passage. This approach is used to thwart access to the portal by unauthorized automated attackers.

The portals with access to sensitive data require a more sophisticated strategy. The typical approach is to authenticate the user through a login process requesting a user identified (userid) and a password. A properly designed login method should not result in more work for the office staff responding to questions like, "How do I login since I lost my password," or "What is my userid?" We suggest using the person's e-mail address for the userid and providing users with an ability to request a new password themselves which is automatically sent to them via their e-mail address.

SECURITY LAYERS

Confidential information is handled through many of the portals. This places a responsibility on the property manager to implement and operate a system that ensures the privacy of this data. Since absolute security of a networked system is impossible, experts recommend a layered approach. The idea is to construct multiple barriers, or layers, to an unwanted intruder. The user authentication procedures described above are one layer of this model.

Other security layers include:

- Network encryption – all web transactions handling sensitive data should use the https protocol.
- Data encryption – avoid storing sensitive data

and, if necessary, save it in an encrypted format to prevent intruders from deriving information from data they may acquire.

- Education – train your employees and portal users on the seriousness of protecting confidential information and associated best practices like not sharing passwords, using complex passwords, changing passwords frequently, log out of their session when they are finished, etc.
- Physical security – ensure that data repositories such as workstations, laptops, external media (backups), etc. are not accessible to outsiders.

TRAINING AND DOCUMENTATION

Educate your office personnel on the value and operation of the self-service portals. They will need to respond to user questions, particularly when you first implement a portal. Communication with and training of the users is paramount to any successful portal project. Use various methods (printed documentation, e-mail message, website notice) to let them know the advantages of using the portal and provide them with instructions for effectively using the portal.


A step-by-step procedure with screen shots is very effective and can be provided via an online tutorial. Some of our clients have made their own customized

video clip and made it available through YouTube. An example of such a video can be found at <http://www.youtube.com/watch?v=ovYRWQYmFQg>.

CONNECTING WITH & UPDATING YOUR DATABASE

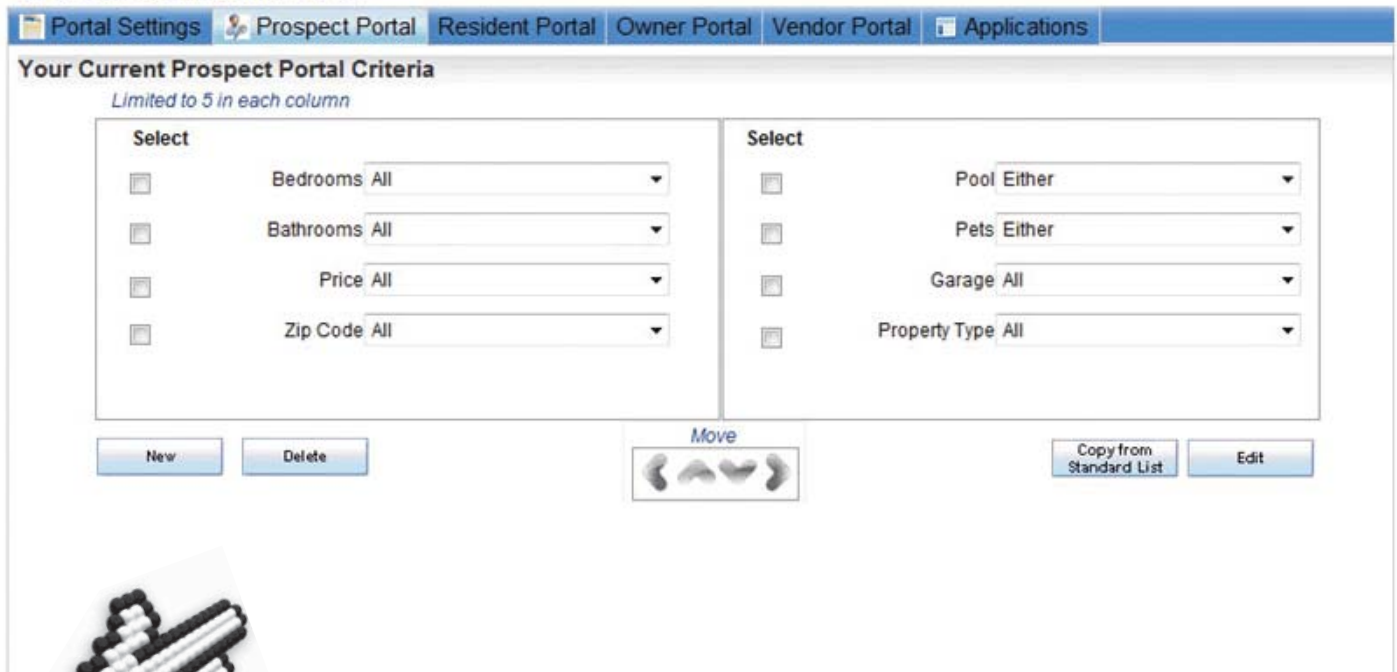
The web server that runs your web portals needs to access your property management database. This is straightforward if they are hosted on the same computer platform. If one vendor hosts your database and another hosts your portals, communication between them must often be arranged through an API (Application Programming Interface). If your database is on a local workstation or network server, other approaches must be considered. Periodically sending a copy of the database to the web server can enable making information available to the portals. The challenge is processing updates or new information to the database. There are various data replication techniques that can be used to address this challenge.

CLOSING COMMENTS

This is the final article of the portal series. Please forward any comments, suggestions, experiences, or questions on the use of web portals to improve customer service and lower property management costs to me at mmino@propertyboss.com. 

See an example of a portal training video on YouTube by visiting <http://www.youtube.com/watch?v=ovYRWQYmFQg>.

Welcome Administrator



“Your Current Prospect Portal Criteria” screen allows the property manager to select from a number of ways a visitor can find homes of interest to rent.