



TENANT PORTAL ACTIVATION INSTRUCTIONS

We are pleased to offer a way for our tenants to access their account information and make online payments.

To create an account:

1. Go to our website: www.tricorealty.com and click on the "Tenant Portal" button



2. On the Tenant Web Access screen, click "Sign up" link.
3. Enter your email address on file. This will be your username. (*required*)

If you are unsure of which email address to use, please contact us at 714-751-4420 or by email at info@tricorealty.com

4. Enter your First Name and Last Name (*required*).
5. Enter your Phone Number (optional).
6. Enter your account number (*required*).

(This can be found on your monthly statement in the top right area.)

7. Click the checkbox next to "I'm not a robot" (*required*).
8. Click "Sign up" button, then check your email to verify your account.
9. Click the **finalize** link in the email and create a password

If you have any questions about Tenant Web Access, please do not hesitate to call our main office at 714-751-4420 or email us at info@tricorealty.com.

TENANT WEB ACCESS

Profile Information

Email Address

First Name


Last Name

Phone Number

Account Validation

Enter the following to verify your personal information and connect this account.

Account #

I'm not a robot 

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FREQUENTLY ASKED QUESTIONS

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Account Basics

Q: How do I create my Tenant Portal Account?

A: If you have not already created your account when applying, please follow these instructions to create an account:

1. Go to our website: www.tricorealty.com and click on the "Tenant Portal" button
2. On the Tenant Web Access screen, click "Sign up" link.
3. Enter your email address on file. This will be your username. (*required*)
If you are unsure of which email address to use, please contact us at 714-751-4420 or by email at info@tricorealty.com
4. Enter your First Name and Last Name (*required*).
5. Enter your Phone Number (optional).
6. Enter your account number (*required*).
(This can be found on your monthly digital statement in the top right area.)
7. Click the checkbox next to "I'm not a robot" (*required*).
8. Click "Sign up" button, then check your email to verify your account.
9. Click the finalize link in the email and create a password

Q: Where do I find my account number?

A: Your account number can be found on your monthly digital statement in the top right area. If you cannot locate it, please contact us at info@tricorealty.com.

Q: What if I forgot my password? How do I reset my password?

A: Click on the "Forgot Password" link on the login screen for the Tenant Portal and follow the prompts to reset your password. It is located under the field where you enter your password.

Q: What is my Username?

A: Your Username is an email address registered to your account. If you are unsure of which email address to use, please contact us at info@tricorealty.com.

Q: Why am I getting "invalid Username or password" when I try to log in?

A: Please make sure you are using an email address registered to your account that was associated with your Tenant Portal and your most recent password. If you are not sure of your Username please contact us at info@tricorealty.com. If you are not sure of your password, please use the "Forgot Password" link on the login screen.

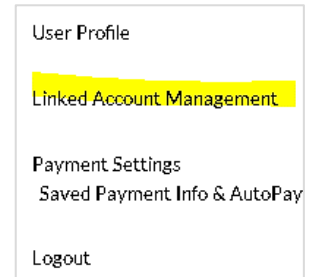
Q: I have my email address and reset my password but I still cannot login?

A: If you are still having trouble, please email us at info@tricorealty.com.

Q: Multiple Accounts: Can I combine my accounts to have 1 login?

A: You can link multiple accounts to have the same username (email address) and password to log in to all of your accounts. Once you have created 1 account:

1. Go to the Settings to “Linked Account Management”
2. Click the “Add Another Account” blue button.
3. Enter your other Trico Account number
4. Enter the same email address you used for your current account
5. Click the blue “Link” button to connect the accounts
6. Your accounts are now linked.



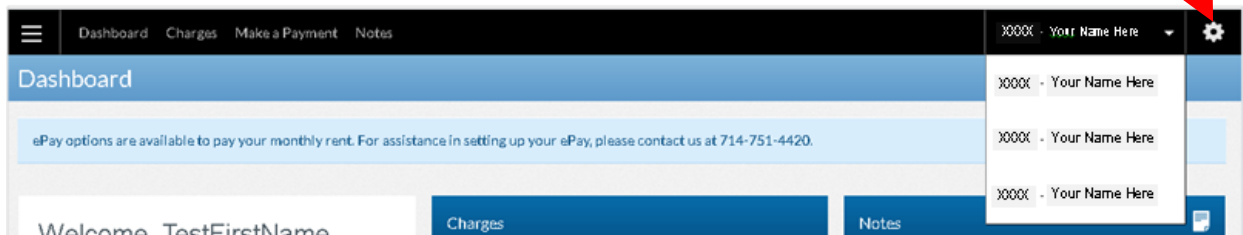
Or if you would like assistance, please email info@tricoREALTY.com asking us to link your other account(s) and we will link them on the back end for you.

Q: Multiple Accounts: How do I view my other account(s) once I log into one of my accounts?

A: Once you have your accounts linked, login as normal, then go to the Far Top Right of the Screen. You should see a Dropdown Arrow next to your name and a Gearbox next to it. Click on the Dropdown Arrow and you should see your different account numbers.

A form titled "To link an additional account, please supply the following information:". It has two input fields: "Account #" and "Email Address" (with the example "someone@company.com"). A blue "Link" button is at the bottom.

This is where you can select which account you are viewing at any given time.



Q: How do I add a User?

A: Please follow the Set Up Instructions with an authorized email address and your account number. You are welcome to set up access to more than one user to your account, but please realize that any user you give access to the account will be able to see all of the account, excluding any saved payment information.

Q: How do I remove a User?

A: Please email info@tricoREALTY.com requesting that a specific user be removed from accessing your account.

Q: Can I change the Personal Name associated with my Username?

A: Yes. Login to your Tenant Portal account as normal. Go to Settings -> User Profile -> Update Personal Information to edit the First Name, Last Name, and Phone Number. Be sure to save your work when done updating!

Payment Set-Up and Auto-Pay

Q: Where do I go to set up my Payment Information?

A: First go to Payment Settings. You will need to click on either a Dropdown Arrow or a Gearbox to the right of the name on your account.

- If you just have one account, it will be a Dropdown Arrow.

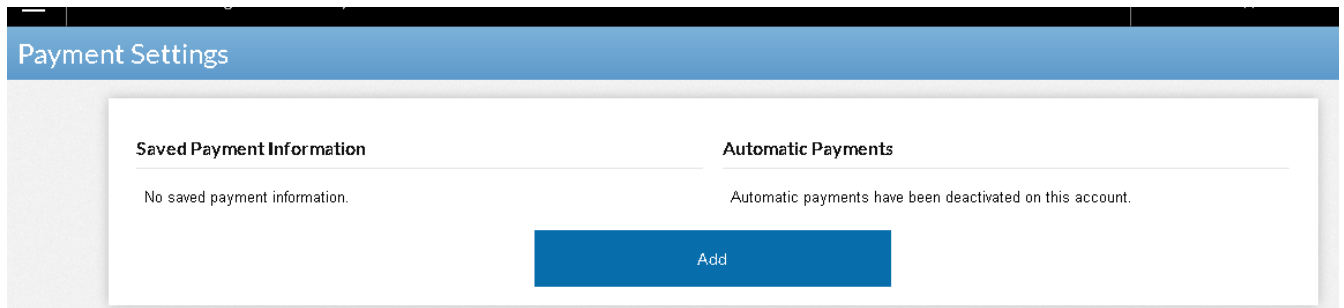


- If you have linked multiple accounts, it should be a Gearbox icon.



Next:

1. Click on the Icon to get a new menu
2. Select "Payment Settings/Saved Payment Info & AutoPay" from the list.
3. Click the Blue "Add" button to add a new payment method



Note: "Account types" defaults to ACH - Checking as it is the first in the list of 4 choices. To select another payment choice (such as a credit card or debit card), please click the dropdown menu icon to the right of the word ACH – Checking.

Add Payment Method: Bank Account (Checking/Savings)

- 1) Start with the left hand side of the screen
- 2) Account Payment Type: ACH – Checking/Savings
- 3) Choose either “ACH – Checking” or “ACH – Savings”
- 4) You will need your routing number and account number
- 5) Enter your Bank Account Number in “Account Number”
- 6) Enter your Bank Account Number again in “Confirm Account Number”
- 7) Enter your Bank Routing Number
- 8) Enter your First Name and Last Name

Note: If your lease is under a company and the bank account in the company name, split the name of the company between the first and last name fields

- 9) Enter the Billing Address associated with your Bank account

- 10) Continue to the right hand side of the screen

- 11) OPTIONAL: If you want to set up Auto Pay, you may do so here or else skip below to #12. For detailed instructions on setting up Auto Pay, go to page 10

- 12) **REQUIRED:** Click the “Terms & Conditions” check box on the right hand side to agree to terms.

You will not be able to proceed with making a payment or saving your Auto Payment information if you have not checked the “I agree to terms” checkbox to acknowledge the Terms and Conditions.

- 13) Click the blue “Save” Button to save your settings!

Payment Method

Account Type:

Account Number:

Confirm Account Number:

Routing Number:

[i](#)

Billing Address

First Name:

Last Name:

Street:

City:

State:

Zip Code:

[Zego Privacy Policy](#)

Automatic Payments

Consider scheduling your payment at least one day in advance of its due date.

Your saved payment information must be valid and current in order for your payments to succeed.

Enable your automatic payment

Day of Month:

Payment Type:

Max Amount:

A convenience fee may be added to your payment amount.

Please be advised that attempted chargebacks for Non-Fraudulent transactions through the Zego Powered by PayLease system will be subject to criminal investigation and these individuals will be prosecuted to the fullest extent of the law.

** E-check Transactions: In the event that the bank for the account used above returns this transaction for Insufficient Funds, I will be assessed a \$25.00 NSF Fee.

Add Payment Method: Credit Card

- 1) Start with the left hand side of the screen
- 2) Account Payment Type: Credit Card
- 3) Enter your Credit Card Number
- 4) Enter your Expiration Date
- 5) Enter your Cvv2 (3 or 4 digits)
- 6) Enter your First Name and Last Name

Note: If your lease is under a company and the bank account in the company name, split the name of the company between the first and last name fields

- 7) Enter the Billing Address associated with your Credit Card account

Payment Method

Account Type: Credit Card

Card Number: [input field]

Expiration Date: August (8) 2021

Cvv2 [input field]

Billing Address

First Name: [input field]

Last Name: [input field]

Street: [input field]

City: [input field]

State: Alabama

Zip Code: [input field]

[Zego Privacy Policy](#) Save

- 8) Continue to the right hand side of the screen
- 9) OPTIONAL: if you want to set up Auto Pay, you may do so here or else skip below to #10. For detailed instructions on setting up Auto Pay, go to page 10
- 10) **REQUIRED**: Click the “Terms & Conditions” check box on the right hand side to agree to terms.

You will not be able to proceed with making a payment or saving your Auto Payment information if you have not checked the “I agree to terms” checkbox to acknowledge the Terms and Conditions.

- 11) Click the blue “Save” Button to **save** your settings!

Automatic Payments

Consider scheduling your payment at least one day in advance of its due date.

Your saved payment information must be valid and current in order for your payments to succeed.

Enable your automatic payment

Day of Month: 1

Payment Type: Total Balance Due

Max Amount: No maximum set

A convenience fee may be added to your payment amount.

Please be advised that attempted chargebacks for Non-Fraudulent transactions through the Zego Powered by PayLease system will be subject to criminal investigation and these individuals will be prosecuted to the fullest extent of the law.

** E-check Transactions: In the event that the bank for the account used above returns this transaction for Insufficient Funds, I will be assessed a \$25.00 NSF Fee.

Cancel

Add Payment Method: Debit Card

- 1) Start on the left hand side of the screen
- 2) Account Payment Type: Debit Card
- 3) Enter your Debit Card Number
- 4) Enter your Expiration Date
- 5) Enter your Cvv2 (3 or 4 digits)
- 6) Enter your First Name and Last Name

Note: If your lease is under a company and the bank account in the company name, split the name of the company between the first and last name fields

- 7) Enter the Billing Address associated with your Debit Card account

Payment Method

Account Type: Debit Card

Card Number: [Empty]

Expiration Date: August (8), 2021

Cvv2: [Empty]

Billing Address

First Name: [Empty]

Last Name: [Empty]

Street: [Empty]

City: [Empty]

State: Alabama

Zip Code: [Empty]

[Zego Privacy Policy](#) Save

- 8) Continue to the right hand side of the screen
- 9) OPTIONAL: if you want to set up Auto Pay you do so here or else skip below to #9. For detailed instructions on setting up Auto Pay, go to page 10
- 10) **REQUIRED**: Click the “Terms & Conditions” check box on the right hand side to agree to terms.

You will not be able to proceed with making a payment or saving your Auto Payment information if you have not checked the “I agree to terms” checkbox to acknowledge the Terms and Conditions.

- 11) Click the blue “Save” Button to **save** your settings!

Automatic Payments

Consider scheduling your payment at least one day in advance of its due date.

Your saved payment information must be valid and current in order for your payments to succeed.

Enable your automatic payment

Day of Month: 1

Payment Type: Total Balance Due

Max Amount: No maximum set

A convenience fee may be added to your payment amount.

Please be advised that attempted chargebacks for Non-Fraudulent transactions through the Zego Powered by PayLease system will be subject to criminal investigation and these individuals will be prosecuted to the fullest extent of the law.

**** E-check Transactions:** In the event that the bank for the account used above returns this transaction for Insufficient Funds, I will be assessed a \$25.00 NSF Fee.

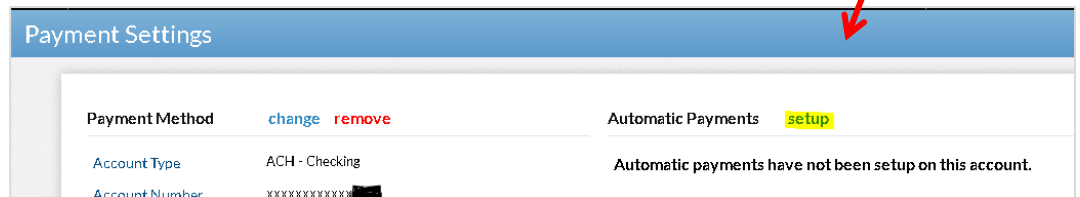
Cancel

Q: How do I set up a Recurring Payment (AutoPay)?

A: First go to the Payment Settings (Saved Payment Info & Auto Pay) in the Settings area.

You must first have your payment information entered. If you have **not** already set up your payment information, please go to the question “Where do I go to set up my Payment Information” on page 6. You will need to set up your Payment Method first before enabling Recurring Payment (AutoPay)

1. Click the Blue “Setup” button to on the right side next to Automatic Payments



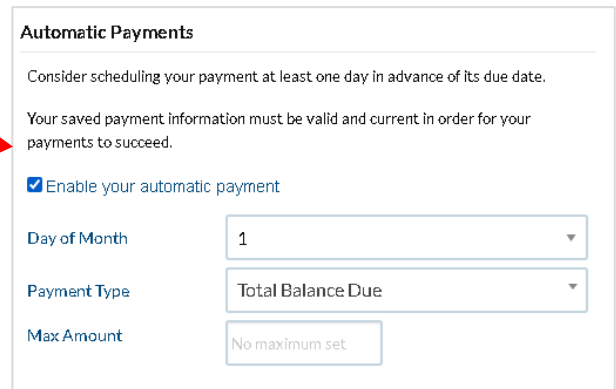
Payment Settings

Payment Method	change remove	Automatic Payments	setup
Account Type	ACH - Checking	Automatic payments have not been setup on this account.	
Account Number	XXXXXXXXXXXX		

2. On the right hand side of the screen
3. Check the box next to “Enable your automatic payment”.

4. Select the Day of the Month you want the transaction to occur on.
5. Select the Payment Type:

- Total Balance Due (default) - Includes charges dated in the future
- Current Balance - Charges dated after specified Day of Month will be excluded
- Specific (Other) Amount - The specific amount you enter will only be paid, regardless of what is due



Automatic Payments

Consider scheduling your payment at least one day in advance of its due date.

Your saved payment information must be valid and current in order for your payments to succeed.

Enable your automatic payment

Day of Month: 1

Payment Type: Total Balance Due

Max Amount: No maximum set

The payment will process around 2am on the Day of Month you have selected.

6. Max Amount is optional.
 - If you want to set a limit that the payment cannot go beyond, this is where you enter the number.
 - If you enter \$0.00, it will not pull money as it thinks the maximum is \$0.00/no money.
 - If you choose to enter a Max Amount, it will not adjust if you have a scheduled rent increase.

7. Click the “Please be Advised” Disclaimer check box (*required*)
8. Click the blue Save Button to save your settings!

Automatic Payments

Consider scheduling your payment at least one day in advance of its due date.

Your saved payment information must be valid and current in order for your payments to succeed.

Enable your automatic payment

Day of Month

Payment Type

Max Amount

A convenience fee may be added to your payment amount.

Please be advised that attempted chargebacks for Non-Fraudulent transactions through the Zego Powered by PayLease system will be subject to criminal investigation and these individuals will be prosecuted to the fullest extent of the law.

** E-check Transactions: In the event that the bank for the account used above returns this transaction for Insufficient Funds, I will be assessed a \$25.00 NSF Fee.

Q: Where do I go to Edit/change up my saved Payment Information?

A: Go to the Settings Icon (Gearbox if linked accounts/Dropdown if single account) from the Home Screen, then click on the “Payment Information” choice to get a new menu.

On the new screen:

1. Click on the blue “change” link to edit your payment information
2. Edit your information.
3. Click the blue “Save” link to save your save your changes

Payment Settings

Payment Method [change](#) [remove](#)

Account Type ACH - Checking

Account Number XXXXXXXXXXXXXXXXXX

Routing Number XXXXXXXXXX

Billing Address

First Name Your Name Here

Last Name Your Name Here

Street 1234 Fake Property

City Costa Mesa

State California

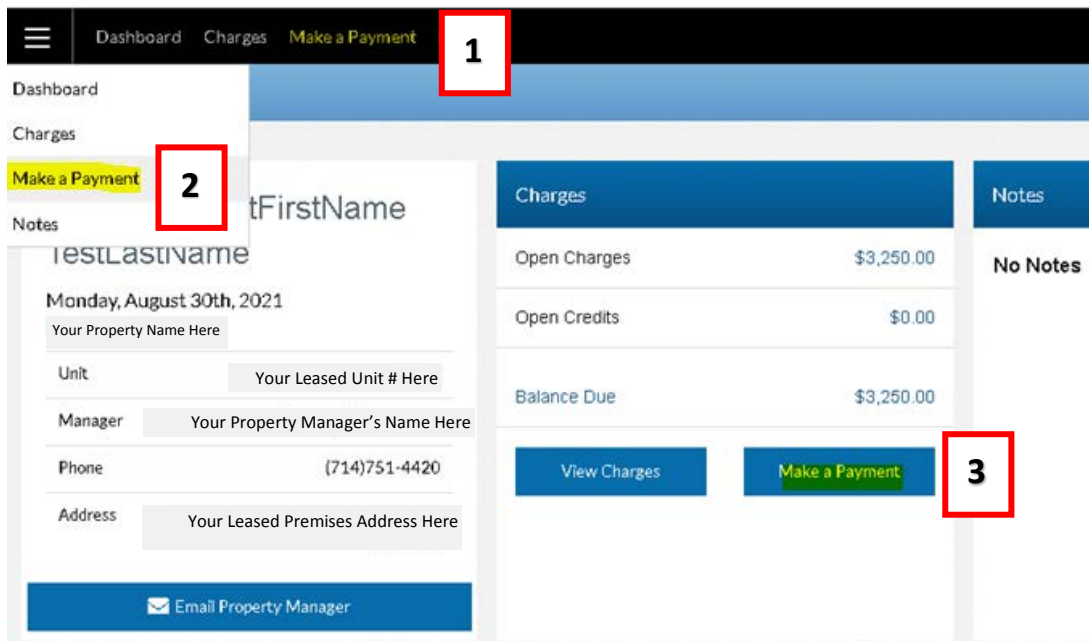
Zip Code 92626

[Zego Privacy Policy](#)

Q: Where do I go to make a one-time payment?

A: From the Home Screen (Dashboard), there are 3 “make a payment” places:

1. In the Top Black Header, click “Make a Payment” link/tab.
2. In the Top Black Header, click the 3 horizontal bars on the left to bring up a menu and click “Make a Payment” on the new menu.
3. In the center of the screen where it says “Charges”, click the blue “Make a Payment” blue button on the Home Screen (only appears if you have an Open Balance).



4. On the new screen, pick “Total Balance”, “Current Balance”, or “Other Amount”
5. Then click the blue “Continue” button.

The screenshot shows a payment selection screen with the following elements:

- A message: "Save time and never forget a payment by [enabling AutoPay](#) for this account."
- Payment Amount** section with three radio button options:
 - Total Balance** (including future charges): \$3,250.00 (Selected)
 - Current Balance** (as of 8/23/2021): \$3,250.00
 - Other Amount**: [Input field]
- Payment Source** dropdown menu: ACH - Checking
- A blue **Continue** button at the bottom.

Note:

- 1) If you do not have a payment method saved you will be prompted to enter one now.
- 2) If you enter an amount in “Other Amount” that equals either the Total Balance or Current Balance Amount, **it will not proceed as it thinks there is an error.** Please only use Other Amount if you are writing in a different amount than the Dollar amounts already given under Total Balance and Current Balance.

6. Review the information is correct

- a. If you have selected a payment method that has a convenience fee, the amount will show in the Payment Summary on the right of the screen. If you decide you don't want to pay with that payment method, please back out of this screen and go to your Saved Payment methods to edit the saved payment method.

Make A Payment

Payment Information		Payment Summary	
Account		Amount	\$3,250.00
Account Type	ACH - Checking	Convenience Fee	\$0.00
Account Number	Ending in [REDACTED]		
	Billing Address		
	[REDACTED]		
	[REDACTED]		
	Costa Mesa, CA 92626		
Memo			
<input type="text"/>			
<input type="checkbox"/> Please be advised that attempted chargebacks for Non-Fraudulent transactions through the Zego Powered by PayLease system will be subject to criminal investigation and these individuals will be prosecuted to the fullest extent of the law.			
** E-check Transactions: In the event that the bank for the account used above returns this transaction for Insufficient Funds, I will be assessed a \$25.00 NSF Fee.		Total Payment	\$3,250.00
Zego Privacy Policy	Pay Now		

7. Memo Field (to Trico Realty) is Optional

8. **REQUIRED** Check the Disclaimer Checkbox next to “Please Be Advised....”

9. Click the Blue “Pay Now” button.

Q: Are there convenience fees to pay online?

A: Fees depend on the Account Type selected.

- ACH – Checking or ACH – Savings: there is **no** convenience Fee.
- Debit Card: \$4.95 flat convenience fee
- Credit Card: 3.5% + \$0.95 convenience fee (Visa, Mastercard, Discover, and American Express)

Q: Why did I get a message saying “Disclaimer Field is Required”?

A: Where is this Disclaimer Field and what is it? You will not be able to proceed with your transaction if you have not checked the Disclaimer checkbox to acknowledge it. It can be found in the Saved Payment Information settings.

Please be advised that attempted chargebacks for Non-Fraudulent transactions through the Zego Powered by PayLease system will be subject to criminal investigation and these individuals will be prosecuted to the fullest extent of the law.

** E-check Transactions: In the event that the bank for the account used above returns this transaction for Insufficient Funds, I will be assessed a \$25.00 NSF Fee.

General Questions

Q: How can I check my Balance? (What do I owe this month?)

A: From the Home Screen (Dashboard), there are 3 “make a payment” places:

1. In the Top Black Header, click “Charges” link/tab.
2. In the Top Black Header, click the 3 horizontal bars on the left to bring up a menu and click “Charges” on the new menu.
3. In the center of the screen where it says “Charges”, click the blue “View Charges” blue button on the Home Screen (only appears if you have an Open Balance).

The screenshot shows the Trico dashboard interface. At the top, a black navigation bar contains 'Dashboard', 'Charges', 'Payment', and 'Notes'. The 'Charges' tab is highlighted with a red box labeled '1'. On the left, a white menu is open, showing 'Dashboard', 'Charges', 'Make a Payment', and 'Notes'. The 'Charges' option is highlighted with a red box labeled '2'. The main content area features a 'Welcome, Info Trico' section with user information fields. To the right, a 'Charges' table displays the following data:

Charges	Amount	Notes
Open Charges	\$3,250.00	No
Open Credits	\$0.00	
Balance Due	\$3,250.00	

Below the table, there are two buttons: 'View Charges' (highlighted with a red box labeled '3') and 'Make a Payment'.

Note: If you do not have any open charges, no charges will appear in this section.

Q: Where do I go to find a copy of my Statement or a signed Lease Document?

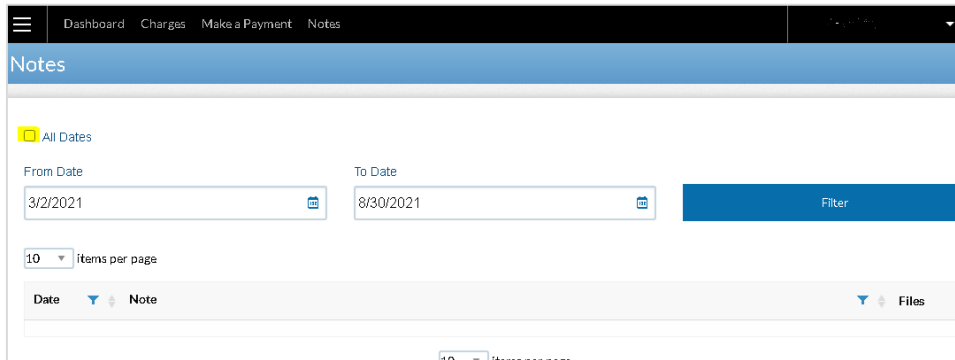
A: At the top of the screen, you will see a black header bar. Click on “Notes” in the Header. Click the checkbox for “All Dates”.

The screenshot shows the 'Notes' section of the Trico dashboard. The top navigation bar has 'Notes' highlighted. The 'Notes' section displays a filter for 'All Dates' (checked). Below the filter, there are input fields for 'From Date' (3/2/2021) and 'To Date' (8/30/2021), and a 'Filter' button. Below the filter, there is a dropdown for 'Items per page' (set to 10) and a table header with columns for 'Date', 'Note', and 'Files'.

Q: Where do I find a copy of an invoice (Electrical Usage, Repair/Rehab. Etc.)?

A: At the top of the screen, you will see a black header bar. Click on “Notes” in the Header.

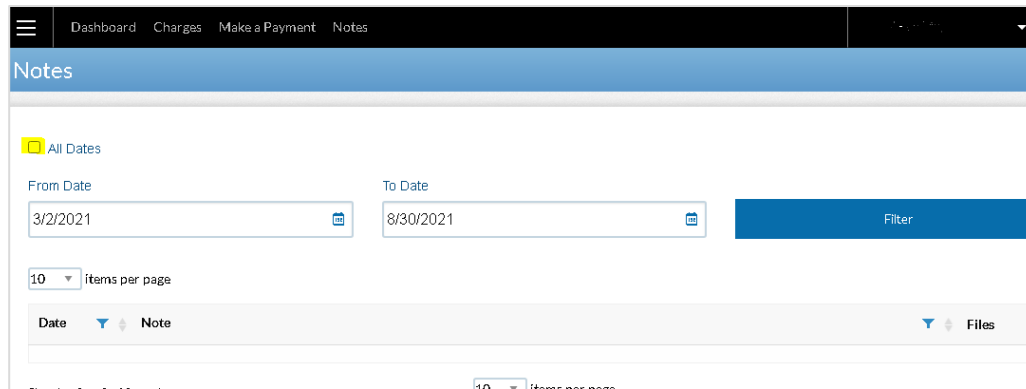
Click the checkbox for “All Date”.



Q: Where do I find a copy of my reconciliation (CAOE/CAM, Property Tax, &/or Property Insurance)?

A: At the top of the screen, you will see a black header bar. Click on “Notes” in the Header.

Click the checkbox for “All Date”.



Q: How do view my Transaction History?

A: Please email info@tricoREALTY.com requesting a copy of your Transaction History and we will email you a copy.