



FIRST MATE
HOME WATCH, LLC

YOUR ANCHOR FOR PEACE OF MIND!

A Quick Guide To Using Our Customer Portal

First Mate Home Watch
Port St Lucie, FL
(772) 237-4998
<http://portal.homewatchit.com/firstmate>



The Customer Portal is your window into our business relationship and provides you one place to go to view past inspection reports and when our future inspections are planned, post when you will be in residence so that we do not schedule visits when you are there, and a place to go to communicate and capture all pertinent communication about your property without having to search your email or text messages. First Mate Home Watch with Home Watch IT is pleased to provide you with this comprehensive tool in a secure server environment. Please click on the links below to view the detailed instructions on how to use each feature:

[OVERVIEW](#)

[LOGGING IN & HOME SCREEN](#)

[INVOICES \(OPEN & CLOSED\)](#)

[“IN RESIDENCE” SCHEDULING](#)

[MAKING A REQUEST](#)

[COMMUNICATIONS AND ISSUES](#)

First Mate Home Watch has invested in this system to give our clients the best possible visibility and experience possible. We are committed to providing you with comprehensive Home Watch and Concierge Services including the communications and information sharing in a secure environment. If you have any questions please do not hesitate to call or email.

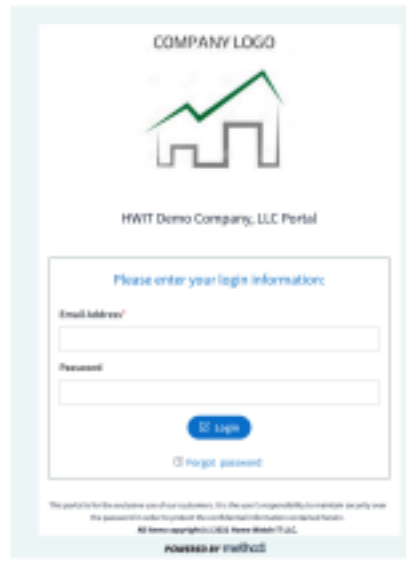


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LOGGING IN & HOME SCREEN

You can access our Customer Portal any time by going to <http://portal.homewatchit.com/firstmate>

. You'll see a login screen as follows:



When you first access the system you initially will not have a password, so after entering your email address the system will email you a link that you can use to set your initial password. Note that if you do not receive this code in your email within a few minutes to check your Spam Folder as it may have gone there.

Once you've set your password, you'll be taken back to the login screen where you can login with your email address and password. At that point, you'll be taken to your personal home screen.



The **Home Screen** allows you to modify your phone number, email address, as well as see if you have open Communications or Transactions to pay.



Brian & Susan Brower

Account Name: Brower, Brian & Susan
Last Transaction: Oct 21 2023 (Balance Forward)
Customer Since: May 07 2020

Full Profile Details

250.00

Current Balance (USD)

Your Profile

Email

gary.fordson@gmail.com

Phone

415-785-4440

Mobile

Fax

Web Site

Customer

Billing

4248 Hill Street SE
Knoxville TN 37920

Property Address

1022 Canada Place Way
Lee Chapel TN 37026

Qualitest Contact Us

gary@homenet30.com

1 Open Transactions

Transaction History

5 Open Communications

View

Communications History



INVOICES (OPEN & CLOSED)

The Recent Transactions Screen will display all open invoices. You can click on any of the invoice lines to see the details of the invoice. There is also an option to pay any open invoices through the portal if you wish to use that in addition to payments through the QuickBooks email that originally contained



your invoice.

Note the dropdown in the upper left -- you can change that from “Due or Outstanding” to “All Transactions” and be able to see any paid invoices and payments you have made previously.



The Visits & Reports Screen is divided into two sections. The top section lists all of your previous home visits and/or concierge items. Next to each of those items is a link to the associated report for that item. You can click on the link and the report will open in a new window (so you may have to click on “Allow Popups” the first time). To return to the list you can close the window containing the report.

The screenshot shows the HomeWatchIT Work Orders interface. At the top, there is a navigation bar with 'Home', 'Recent Transactions', 'Visits & Reports', and 'In Residence'. Below this is a 'Work Orders' header with a sub-header 'Browse, Write & Secure'. The main content is divided into two sections: 'Previous Visits and Reports' and 'Upcoming Visits'. Both sections contain tables with columns for Date, Job Name, Assigned To, and Status. The 'Previous Visits and Reports' section has 5 rows of data, and the 'Upcoming Visits' section has 5 rows of data. Each row includes a 'Go To Report' link. The interface also features pagination controls at the bottom of each table, showing '1 - 10 of many' and 'Page 1'.

Date	Job Name	Assigned To	Status	Go To Report
05-20-2020	Meet plumber to look at master bath shower leak	Sary	Not Started	Go To Report
06-24-2020	Weekly Home Visit	Sary	Not Started	Go To Report
05-22-2020	Weekly Home Visit	Sary	Completed	Go To Report
06-18-2020	Weekly Home Visit	Sary	Waiting on someone else	Go To Report
05-20-2020	Meet electric to look at fan issue	Sary	Completed	Go To Report

Date	Job Name	Assigned To	Status
Nov-09-2020	Weekly Home Visit	Sary	Completed
Nov-13-2020	Weekly Home Visit	Sary	Not Started
Nov-20-2020	Weekly Home Visit	Sary	Not Started
Nov-27-2020	Weekly Home Visit	Sary	Cancelled
Dec-04-2020	Weekly Home Visit	Sary	Not Started

The Section below shows Upcoming scheduled visits -- both home visits and concierge items will be listed for your review.

If you see any issues or need to send a message, you can use the New Communication link on your Home Page to do so. This will be discussed later in this guide.





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In Residence Calendar

Home, Brian & Jordan

We have you scheduled to be in Residence on these dates:

From Date	To Date	Comments
Nov-26-2021	Dec-03-2021	In Residence-Thanksgiving
Dec-03-2021	Dec-25-2021	In Residence-Christmas

1 - 2 of 2 records.

[Click Here to Add](#)

Our system keeps track of when you will be coming and going from your property so that we can better schedule our visits around your time In Residence. By going to this screen you can see the dates that we are aware of you being at the property, and you can modify the date and/or add new dates any time.

If entries are already on your list and you wish to modify them, you can click on that line to open the details and modify them. Clicking the New Entry button will also allow you to enter a new item from scratch. When you wish to modify or add a new entry a place for those details will open on the bottom of the screen.

Press Save when you are finished.

Nov-26-2019	Dec-01-2019	In Residence - Thanksgiving
Dec-13-2019	Dec-29-2019	In Residence - Christmas

1 - 2 of 2 records.

[Enter New Dates](#)

SecAddNewDates

ArrivalDate: X

Departure Date: X

Comments:

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MAKING A REQUEST

You are able to request services through the portal by selecting the Request menu option.

When first entering the Request section you will see a list of all current and past/completed requests on the screen. If you need to modify a current request you can do so by clicking on that line. To enter a new request, click on the Add a New Request button.

★ Requests List

New Requests

Req Number	Date	Due Date	Title	Notes	Assigned To	Req Status
0 - 10 of 0 records.						
Add new request						

Previous Requests

Req Number	Date	Due Date	Title	Notes	Assigned To	Req Status	Estimate Status
0 - 10 of 0 records.							

Fill in the form completely with the date you entered the request, the date you require the request to be completed, plus a description and other notes information. You should then select the most appropriate "Item" in the item list presented. Note that some items may require a price adjustment depending upon the service rendered. In that case, you will receive an email notifying you of an update to the request for your approval of the change.

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COMMUNICATIONS AND ISSUES

Our portal offers a comprehensive communications system, allowing us to track previous dialog as well as manage current communications with our clients. This ties to our main system so that we have an always present To-Do List to track and manage whatever needs you have through completion.

To send a new Communication to us, such as a comment after you receive our home visit report, click on the New link on the Communications box on the Home Screen.

Comment box and press Send.

When we reply to you, you'll receive an email notifying you of the reply. You can view and respond to our reply easily by clicking on the Communications box on your home screen, which will bring up a list of all history back and forth between us.

Should you wish to reply to an item, simply click on it, and you'll be taken to a new screen to enter your response. Notice that the screen shows that you are replying to the Communication item you clicked on from the list screen.

Click Save after you've entered in your response and we'll be notified immediately.

We hope you find our portal useful! Thank you.

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