



**WHEN & HOW**  
*Concierge Services*

**A Quick Guide  
To Using  
Our Customer Portal**

Coastal Escapes Limitless Services, LLC dba  
When & How Concierge Services  
Venice, Florida  
(941) 525-2947

<http://portal.homewatchit.com/whenandhow>



---

## OVERVIEW

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. Coastal Escapes Limitless Services, LLC dba When & How Concierge Services 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](#)

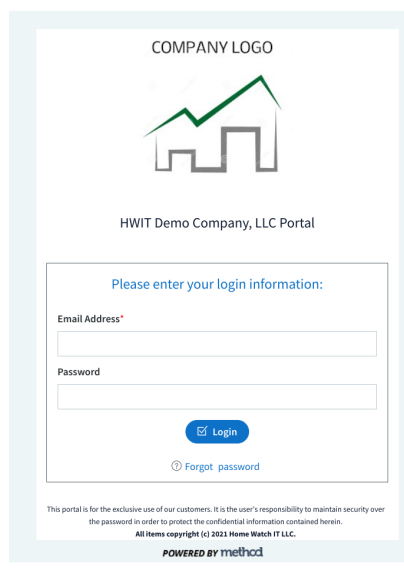
[COMMUNICATIONS AND ISSUES](#)

Coastal Escapes Limitless Services, LLC dba When & How Concierge Services 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.




## LOGGING IN & HOME SCREEN

You can access our Customer Portal any time by going to <http://portal.homewatchit.com/whenandhow> . You'll see a login screen as follows:



COMPANY LOGO



HWIT Demo Company, LLC Portal

Please enter your login information:

Email Address\*

Password

Login

Forgot password

This portal is for the exclusive use of our customers. It is the user's responsibility to maintain security over the password in order to protect the confidential information contained herein.  
All items copyright (c) 2021 Home Watch IT LLC.

POWERED BY method

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.

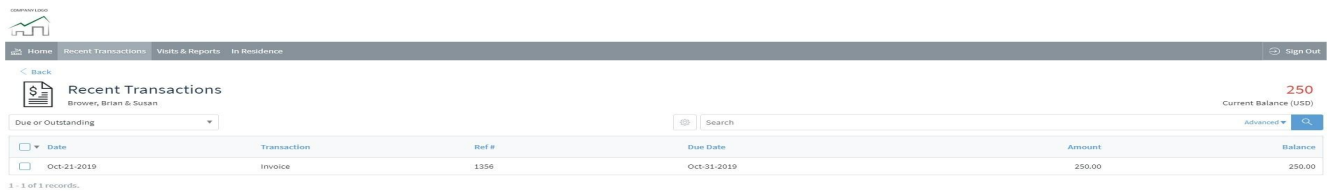
Once you've set your password, you'll be taken back to the login screen where you can login with your email address and password. At that point, you'll be taken to your personal home screen.

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.

The screenshot shows a user dashboard for Brian & Susan Brower. At the top, there is a navigation bar with links for Home, Recent Transactions, Visits & Reports, and In Residence, along with a Sign Out button. The user's profile is displayed, including their name, account name, last transaction date, and current balance of 250.00 USD. A 'Your Profile' section lists contact information such as email, phone, mobile, fax, and web site. Billing and property address details are also provided. On the right side, there are two summary boxes: '1 Open Transactions' with a 'Transaction History' link, and '5 Open Communications' with a 'New' indicator and a 'Communications History' link. A 'Questions? Contact Us!' section at the bottom provides an email contact: gary@homewatchit.com.



## INVOICES (OPEN & CLOSED)



Recent Transactions

Due or Outstanding

Search

Advanced

Date	Transaction	Ref #	Due Date	Amount	Balance
Oct-21-2019	Invoice	1356	Oct-31-2019	250.00	250.00

1 - 1 of 1 records.

Current Balance (USD): 250

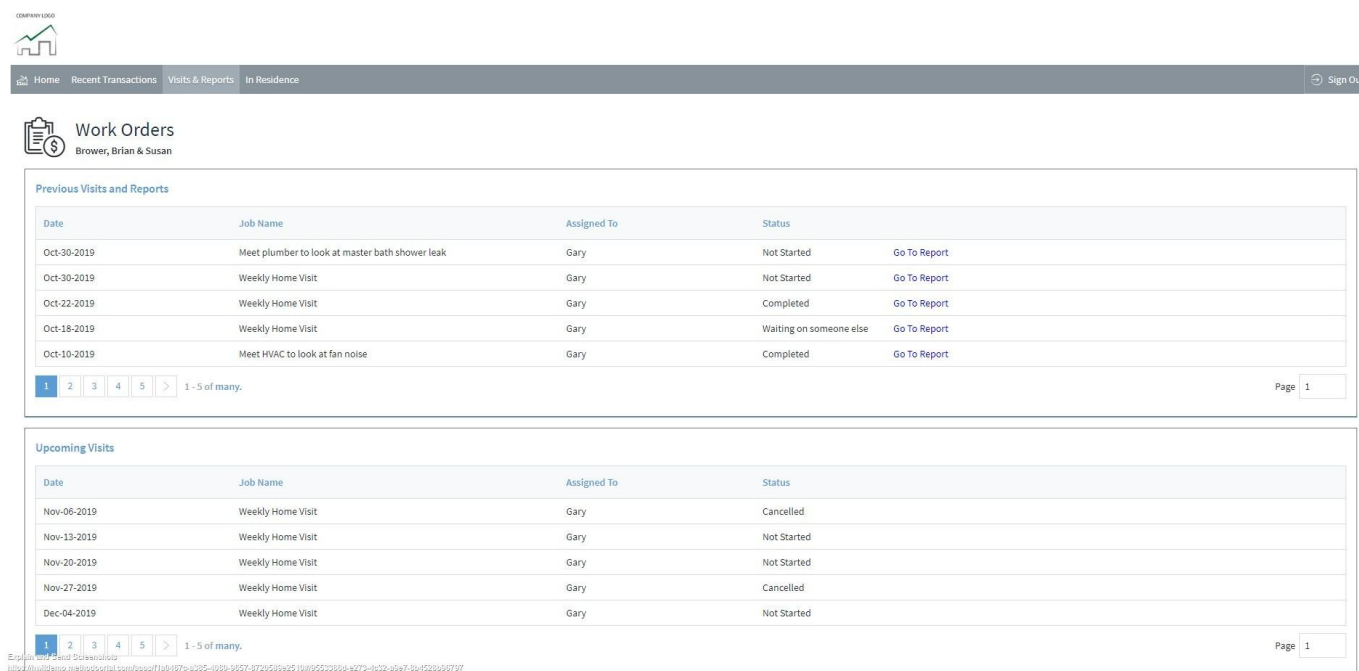
The Recent Transactions Screen will display all open invoices. You can click on any of the invoice lines to see the details of the invoice. There is also an option to pay any open invoices through the portal if you wish to use that in addition to payments through the QuickBooks email that originally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



## REPORTS AND SCHEDULED VISITS

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 'Work Orders' interface for user 'Brower, Brian & Susan'. It features two main 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' table lists five entries from October 2019, with statuses ranging from 'Not Started' to 'Completed'. The 'Upcoming Visits' table lists five entries from November and December 2019, with statuses including 'Cancelled' and 'Not Started'. Each table includes a pagination control at the bottom, showing '1 - 5 of many' and a 'Page 1' indicator.

Date	Job Name	Assigned To	Status	
Oct-30-2019	Meet plumber to look at master bath shower leak	Gary	Not Started	Go To Report
Oct-30-2019	Weekly Home Visit	Gary	Not Started	Go To Report
Oct-22-2019	Weekly Home Visit	Gary	Completed	Go To Report
Oct-18-2019	Weekly Home Visit	Gary	Waiting on someone else	Go To Report
Oct-10-2019	Meet HVAC to look at fan noise	Gary	Completed	Go To Report

Date	Job Name	Assigned To	Status	
Nov-06-2019	Weekly Home Visit	Gary	Cancelled	
Nov-13-2019	Weekly Home Visit	Gary	Not Started	
Nov-20-2019	Weekly Home Visit	Gary	Not Started	
Nov-27-2019	Weekly Home Visit	Gary	Cancelled	
Dec-04-2019	Weekly Home Visit	Gary	Not Started	

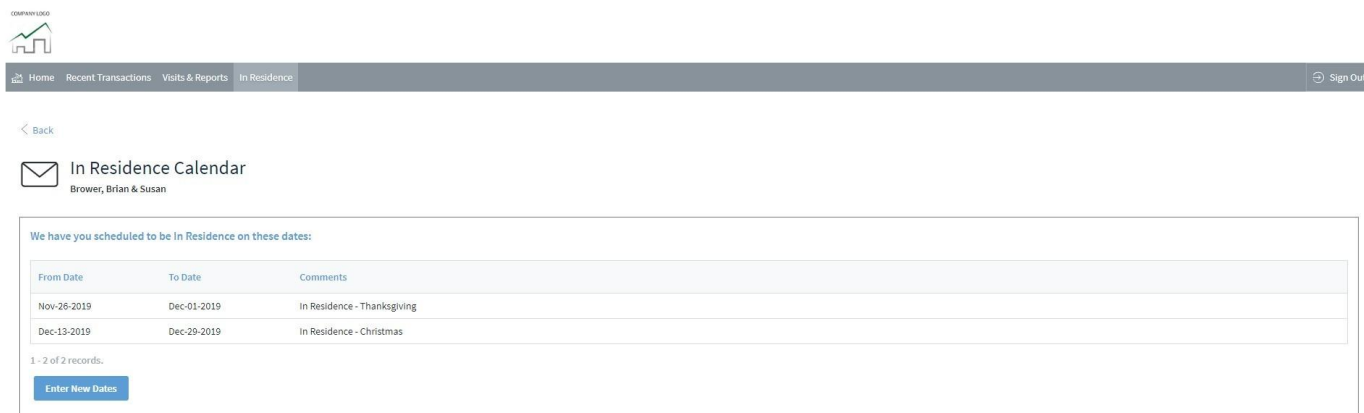
The Section below shows Upcoming scheduled visits -- both home visits and concierge items will be listed for your review.

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.



## “IN RESIDENCE” SCHEDULING


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.



COMPANY LOGO

Home Recent Transactions Visits & Reports In Residence Sign Out

< Back

 In Residence Calendar  
Brower, Brian & Susan

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

From Date	To Date	Comments
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](#)



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.



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   

Departure Date   

Comments

[Cancel](#) [Save](#)

Press Save when you are finished.



## 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.

COMPANY LOGO

Home Recent Transactions Visits & Reports In Residence Sign Out

< Back

Communications  
Brower, Brian & Susan

Date: Nov-01-2019 01:44 PM

Status: Not Started

From: Brower, Brian & Susan

Comments

★ Frequent Text Arrange Insert

Please take care of my car registration. Thank you.

Cancel Send

Enter in your notes in the large 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.





Home Recent Transactions Visits & Reports In Residence Sign Out

< Back

Communications  
Brower, Brian & Susan

Previous Communications

Date	From	Status	Comments
Nov-01-2019 01:46 PM	Gary	In Progress	We will take it for smog check next Saturday and have them apply for the registration at that time.
Nov-01-2019 01:44 PM	Brower, Brian & Susan	In Progress	Please take care of my car registration. Thank you.
Oct-25-2019 11:57 AM	Brower, Brian & Susan	Completed	Please check that the boat charger light is lit. Thanks. Completed.
Oct-25-2019 11:55 AM	Brower, Brian & Susan	Completed	Please check that the boat charger is currently lit. Thanks. Completed.
Oct-23-2019 01:57 PM	Brower, Brian & Susan	Not Started	Yes. Please use the updated color scheme.
Oct-23-2019 11:03 AM	Gary	Not Started	Do you want me to call the painter to get the exterior estimate? Yes, for \$1,200.
Jun-25-2019 08:54 AM	Gary	Completed	Completed.
Jun-25-2019 08:32 AM	Brower, Brian & Susan	Completed	Can you have landscaper remove the oak tree. Completed.

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.

COMPANY LOGO

Home Recent Transactions Visits & Reports In Residence Sign Out

< Back

Communications

Replying To: We will take it for smog check next Saturday and have them apply for the registration at that time.

Date: Nov-01-2019 01:48 PM

Status: Not Started

From: Brower, Brian & Susan

Comments

★ Frequent Text Arrange Insert

⬅ ➡ B I U ☰ ☷ 🔗 📎 📧

Cancel Save

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

We hope you find our portal useful! Thank you.

