

## **E-Online User Guide**

Updated for version 2.0 - January 14, 2013

# **Client Version**

- Once your company has been approved and set-up on E-Online and users have been given usernames and passwords, they can log-on to E-Online.
- The home page, when logging in, will always be the **Pending Order Log (see below)**.
- On the menu to the left, you will have access to see:
  - o **Pending Order Log** (home page) a list of all your pending orders.
  - o **Pending Order Calendar** a list of all your pending orders (same as Pending Order Log above) but in a user friendly calendar-view format.
  - o **Open Leases** view and/or pickup/adjust current open leases.
  - Closed Leases view the last 60 days of leases that have been completely picked-up and closed.
  - o **Place Order** input a request for a new delivery.
  - Update Profile You will be able to change or update your personal information
  - o Logout. Logout of your session.
  - Furniture Collections view your uniquely created furniture packages including all pricing and other terms.

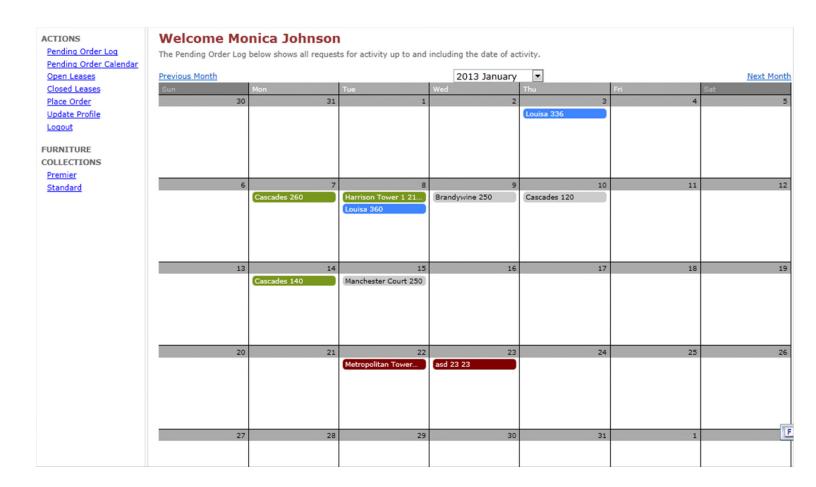
#### **Pending Order Log**

Welcome Monica Johnson Pending Order Log The Pending Order Log below shows all requests for activity up to and including the date of activity. Pending Order Calendar Open Leases Closed Leases Place Order Requested For Date Ordering Contact Update Profile Logout FURNITURE Orders Pending Approva COLLECTIONS 73-20121221-Premier 12/21/12 16:13:06 1/9/13 Brandywine Adjustment/Change Monica Johnson 250 Fresno Standard <u>73-</u> 20121221-12/21/12 16:16:53 1/10/13 120 Adjustment/Change Monica Johnson Cascades Fresno <u>73-</u> 20121221-12/21/12 16:11:33 1/15/13 Monica Johnson Adjustment/Change 0004 Delivery Court 12/21/12 16:23:48 1/3/13 Monica Johnson Portland Louisa 336 Adjustment/Change 73-20121221-12/21/12 16:18:20 1/7/13 Fresno 260 Adjustment/Change Monica Johnson Cascades 0009 Delivery 65-20121221-12/21/12 16:10:05 1/8/13 Monica Johnson Portland 1-2115 Adjustment/Change Delivered Today No action required. If you 20121221-0005 12/21/12 16:12:16 Orenco this order please refer to the 1/3/13 Portland 2-120 Monica Johnson open leases. Delivered 12/22/12 8:42:19 No action required. If you need to request a change on his order please refer to the open leases. 20121221-0010 Portland 12/21/12 16:19:00 1/3/13 Louisa 336 Monica Johnson Delivered 12/22/12 8:42:30 refresh

- ✓ **PENDING ORDER LOG** This page acts as your home page. It will track all pending activity requested by you from origination through completion of your order. The orders will first appear in the section called <u>Orders Pending Approval</u>. Once they have been granted final approval, they will move down into the next section of the Pending Log called <u>Waiting Delivery</u>. Once the order has been completed by Express, it will move down to the last section called <u>Delivered Today</u>. The columns of the **Pending Order Log** are:
  - Order Number and Order Type. The order number is sequentially generated and uses the format of market #-year/month/day-sequential order of the day beginning with #0001. The order type choices are <u>Delivery</u>, <u>Complete Pickup</u> or <u>Adjustment</u>. By clicking on the highlighted order number, you can review the details of what you requested.

- o **Submitted Date**. The date and time the order was placed is displayed.
- o **Requested for Date.** This is the date the activity was requested for. The Pending Order Log is sorted in ascending order by date of activity.
- O **Delivery Time Frame.** For orders listed under <u>Waiting Delivery</u>, you will see a delivery time frame for any order scheduled for the current day.
- Ordering Contact. This displays the name of person who placed the order on E-Online. If you click on the name, it will open an e-mail window to that person.
- o **Market.** This is the Express market that is responsible for completing the order.
- o **Property.** This displays the property or apartment name.
- o **Apartment #.** The unit # of the property or apartment.
- **Change.** This column gives you the ability to change the order request up to the point that the Express market identifies the order as delivered. Until the point of final approval by Express, the change can either be to cancel the order or change the activity date only. If a change needs to be made other than these two things, you must contact the order desk. The order desk or the market both have the ability to change PO number, apartment name, apartment number and/or phase, street, city, state or zip code. Once the order desk has given final approval, the order will appear in the Waiting for Delivery section and the options that you have for change will vary depending on what type the request is. If the request is for a new lease you will have the ability to request an adjustment, a change of address or delivery date, a complete pickup or a cancellation. If the request is for an adjustment or a pickup, your options will be limited to requesting a date change or a cancellation. Once we have completed your order, our drivers will contact the respective market and your order will be marked as delivered. The actual date and time the order was called in as being completed will be noted in this column.
- Email Confirmation When a change request has been initiated by you to an existing order, you will receive an email confirming that your change request has been approved.

#### **Pending Order Calendar**



✓ PENDING ORDER CALENDAR – The Pending Order Calendar simply takes the Pending Order Log and presents it in a month-at-a-glance calendar view format for easing viewing of your orders. All orders listed under <u>Orders Pending Approval</u> and <u>Waiting Delivery</u> in your Pending Order Log are shown. Orders are color-coded by type of order – new deliveries are green, complete pickups are red and adjustments are blue. If the order has not been approved by your EFR representative, it will have a grey background until approved. Each order on the calendar is identified by showing the property name and unit number. When you click on any order on the calendar, it will open a pop-up window that shows the order in the same format as the Pending Order Log (see above for detailed description).

#### **Open Leases Page**



✓ OPEN LEASES – This page (see above) lists all your open leases. For open leases that have been delivered and posted in our EFR system, the detailed information of the lease is available to view by clicking on the highlighted lease #. If the lease has been delivered but not yet posted in the EFR system, only the order detail as requested by you, is available and can be viewed by clicking on the highlighted order #. The EFR system will upload every night all open leases that have been posted. It usually takes up to 48 hours from delivery date to post new leases into the EFR system. You can tell which open lease has been delivered and posted versus delivered and not yet posted by looking at the Lease # column. If the Open Lease column has a lease #, it has been delivered and posted. If it is blank, it has been delivered but not been posted.

By default, all open leases will be displayed when this page is opened. Above the open lease header are some sort features. The default date range sort is 60 days prior to tomorrow's date and references delivery date. You can enable this feature by selecting the box "use date filter". Otherwise, this feature is disabled as a default. You can further limit your search by choosing the market you wish to view. Your choices are listed in the pull-down menu. Once selected, only those open leases will be available to view.

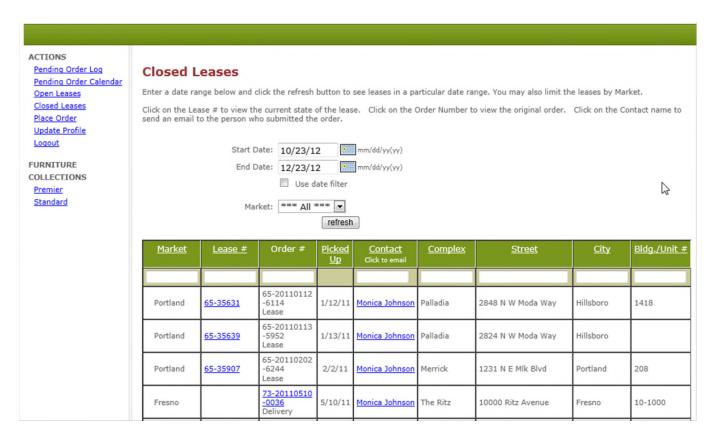
Under the Open Leases header, there are more built-in search and sort features. For narrowing your search, you can enter search criteria in any column that has a blank box under its heading. For example, if you wanted to only show leases delivered to a particular city, you type in the name of that city and hit the refresh button and only those open leases in that city will be shown. To revert back to show all open leases again, just delete the name of the city you input and hit the refresh button. A sort feature is also available to any column heading that is underlined. By simply clicking on the heading of the column you wish to sort by, the list will automatically sort by alphabetical or numerical order depending on the column in ascending order. When the Open Lease page is opening, it is defaulted to sort all open leases in ascending order by Order #.

We have also included a powerful search tool called the 'wildcard'. In any of the column headers that have a blank box, you can look for a string of letters or numbers by using the asterisk'\* key. For example, under the Complex heading, if you entered \*Camb\* and hit refresh, the search will list all open lease that have the string Camb in the name of the complex such as Cambridge Village. Another example is if you just want to bring up all unit numbers that contain a 3. You would type in \*3\* in the Bldg./Unit # box. If you wanted to bring up all unit numbers that start with the number 3, you would type in 3\*. If you wanted to bring up all unit numbers that started with a 3 and contained a 2, you would type in 3\*2\*.

- Market. The EFR market that is handling the order. If you see a + to the left of the market, that means that this lease has associated activity. To see what the activity is, click on the + and the associated adjustment or pickup request will expand below. To revert back, click on the + again.
- Lease #. The internally generated lease # assigned by EFR. To view the details of the lease, click on the highlighted and underlined lease #. If there is no lease # listed, it means the lease has not yet been posted in the EFR system. It generally takes up to 48 hours for new leases to post after delivery.
- Order #. The internally generated E-Online order number assigned to each order by EFR. If the newly delivered lease has not yet been posted, you may click on the highlighted and underlined order # to see the details of the order.
- o **Delivery Date.** The date the lease was originally delivered.
- o **Contact.** The client user who initiated the order.
- **Complex.** The name of the property or apartment complex the furniture was delivered to.

- o **Street.** The name of the street the furniture was delivered to.
- o **City.** The name of the city the furniture was delivered to.
- O **Building/Unit #.** The building and/or unit # the furniture was delivered to.
- o **Request.** You will see a button called <u>Adjustment/Pickup</u>. If you would like to have the open lease picked-up or adjusted, you would click this button and a pop-up window will appear. You have the option to <u>View Originating Lease</u> by clicking on the highlight. This would help if you wanted to do an adjustment on the lease and wanted to see the list of items delivered. The next item is to select between two choices an adjustment or a complete pickup of the lease. You would then select the desired date of activity. Below the activity date is a checkbox for permission to enter. By checking this box, you are notifying us that we have permission to enter the unit to complete the order request. The next step is to type any detailed information that you want EFR to know. Finally, click the submit button to send to EFR Order Desk or cancel. Once submitted, this request will now appear on your **Pending Order Log.**
- o **Email Confirmation -** You will receive a system-generated email confirming your order has been received. Once your order has been granted final approval by the order desk, you will receive a final email confirming the details of your order.

## **Closed Leases Page**



✓ **CLOSED LEASES** – This page (see above) lists all your closed leases for the past 60 days. Our system archives all closed leases more than 60 days old.

Above the closed lease header are some sort features. The default date range sort is 60 days prior to tomorrow's date and references delivery date. You can enable this feature by selecting the box "use date filter". Otherwise, this feature is disabled as a default. You can further limit your search by choosing the market you wish to view. Your choices are listed in the pull-down menu. Once selected, only those open leases will be available to view.

Under the Closed Leases header, there are more built-in search and sort features. For narrowing your search, you can enter search criteria in any column that has a blank box under its heading. For example, if you wanted to only show leases delivered to a particular city, you type in the name of that city and hit the refresh button and only those open leases in that city will be shown. To revert back to show all open leases again, just delete the name of the city you input and hit the refresh button. A sort feature is also available to any column heading that is underlined. By simply clicking on the heading of the column you wish to sort by, the list will automatically sort by alphabetical

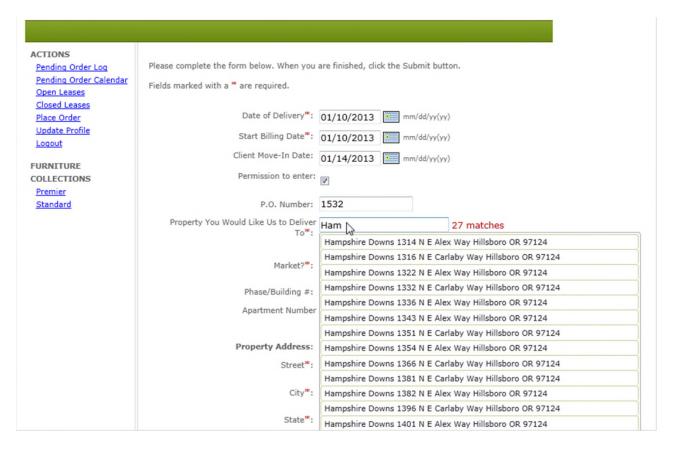
or numerical order depending on the column in ascending order. When the Closed Lease page is opening, it is defaulted to sort all closed leases in ascending order by Order #.

We have also included a powerful search tool called the 'wildcard'. In any of the column headers that have a blank box, you can look for a string of letters or numbers by using the asterisk'\* key. For example, under the Complex heading, if you entered \*Camb\* and hit refresh, the search will list all open lease that have the string Camb in the name of the complex such as Cambridge Village. Another example is if you just want to bring up all unit numbers that contain a 3. You would type in \*3\* in the Bldg./Unit # box. If you wanted to bring up all unit numbers that start with the number 3, you would type in 3\*. If you wanted to bring up all unit numbers that started with a 3 and contained a 2, you would type in 3\*2\*.

- Market. The EFR market that is handling the order. If you see a + to the left of the market, that means that this lease has associated activity. To see what the activity is, click on the + and the associated adjustment or pickup request will expand below. To revert back, click on the + again.
- o **Lease #.** The internally generated lease # assigned by EFR. To view the details of the lease, click on the highlighted and underlined lease #.
- Order #. The internally generated E-Online order number assigned to each order by EFR.
- o **Picked Up.** The date the lease was picked up and closed.
- o **Contact.** The client user who initiated the order.
- O **Complex.** The name of the property or apartment complex the furniture was delivered to.
- o **Street.** The name of the street the furniture was delivered to.
- o **City.** The name of the city the furniture was delivered to.
- O **Building/Unit #.** The building and/or unit # the furniture was delivered to.

ACTIONS				
Pending Order Log	Please complete the form below. When you are finished, click the Submit button.			
Pending Order Calendar	Fields marked with a * are required.			
Open Leases	The state of the s			
Closed Leases	Date of Delivery*: mm/dd/vv(vv)			
Place Order	Date of Delivery*:			
Update Profile Logout	Start Billing Date*: mm/dd/yy(yy)			
Loquat	Client Move-In Date:			
FURNITURE	Client Move-In Date: mm/dd/yy(yy)			
COLLECTIONS	Permission to enter:			
Premier				
Standard	P.O. Number:			
	Property You Would Like Us to Deliver			
	To*: (name of an apartment community, house, or a description of another location)			
	Market?**: Fresno ▼			
	Phase/Building #:			
	Apartment Number			
	(You may leave this blank if this is not an apartment community)			
	Property Address:			
	Street*:			
	City*:			
	State*: ▼			

✓ PLACE ORDER – This is where you can submit an order for a new delivery (see above). We have simplified the order entry process by creating an autofill function and combining this with a database of many, if not all, of the apartment communities you will be renting units from. By typing in at least the first 3 letters or numbers in any of these 4 fields – Property, Street, City or Zip Code - the system will pull up all of the potential apartment communities containing these letters or numbers. The more letters or numbers you type in, the narrower the search becomes. Once you select the property you are looking for, the system will auto-fill the remaining information including name of property, Express market, street address (some properties have multiple street addresses), city, state and zip code. Important note: You cannot change the Express Market once you have selected the property using the auto-fill function. If the property you are looking for is not listed, simply enter in the property name and our database will be updated for future reference.



- O Date of Delivery. Delivery date you are requesting. Please note that some properties may be in cities where we have a restricted delivery schedule. (A list of cities and the days of the week we deliver appear on our website <a href="www.efrental.com">www.efrental.com</a>) If you have selected a property in a city with restricted delivery days and you have selected a day we do not deliver, a pop-up window will appear to let you know you will need to select a different date of delivery. (required)
- o **Start Billing Date.** This automatically defaults to delivery date and normally should not be changed unless prior permission to do so has been granted. (required)
- Client Move-in Date. This is the date that the tenant is planned to move in. This is not a required field but provides helpful information to our team.
- O **Permission to Enter.** Checking this box lets us know that you have been given permission for us to enter the unit.

- o **P.O. Number.** This can be alpha/numeric up to 10 characters long for your own internal tracking.
- o **Property You Would Like Us to Deliver to.** Name of an apartment complex, house or a description of building. (required)
- Market. Select an EFR market from the pull-down list that will be handling your request. You have been given access to all markets you requested on initial set-up. If you don't see your market listed, please e-mail <u>orders@efrental.com</u> to request a new market added. (required)
- o **Phase/Building #.** Self-explanatory.
- o **Apartment Number.** Self-explanatory.
- Property Address. Please enter street address, city, state and zip code. <u>These fields are part of the auto-fill feature and will be filled in automatically if you already selected the Property above</u>. (All required except zip code. Entering zip code will ensure correct sales tax calculation.)

State*:	California
Zip:	93706
Select Package*:	Premier 2 bedroom Pricing
Minimum Lease Term*:	3 Month 💌
Estimated Price:	570.00
Bed size in bedroom 1:	Queen
2:	Twin (x2)
Housewares:	Deluxe -
How many bathrooms:	
You may select from the Add-Ons show market.	n below. Please keep in mind that these vary based on

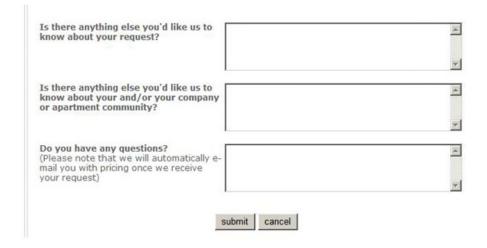
o **Select Package.** All packages created and available for you are listed in pull-down menu. Please select a package including number of bedrooms. Once selected, you can view package along with lease term and pricing options by clicking on <u>Pricing</u> to the right. (required)

- o **Minimum Lease Term.** The choices listed are pre-authorized per your individual packages. (required)
- o **Estimated Price.** After selecting desired package and minimum lease term, the estimated monthly price will be reflected here. If there are changes or add-ons selected, the price will change accordingly.
- O Bed Size. Once you select your package above including number of bedrooms, bed-size pull down menus will appear. The default bed size for each bedroom is queen. Using the pull-down menu, you can select the bed size desired for each bedroom. If your package pricing requires a price adjustment for different size beds, this will be reflected in Estimated Price.
- Housewares. If you have requested houseware package pricing be available, the pull-down menu will show choices. If no request has been made to rent housewares, this field will not be available to you.
- o **How many bathrooms.** If you have requested houseware package pricing be available, you will be required to use the pull-down menu to select number of bathrooms.
- o **Add-ons.** The available add-ons and their respective pricing have been previously agreed upon when packages where created. First, simply click the box on the items you would like to add to your delivery. The system will then default the number of items to 1. If you would like more than 1 of the selected item, change the quantity in the field to the far-right. Any selections made to Add-ons will adjust the price under Estimated Price.

You may select from the Add-Ons shown below. Please keep in mind that these vary based on market.



## **Place Order Page**

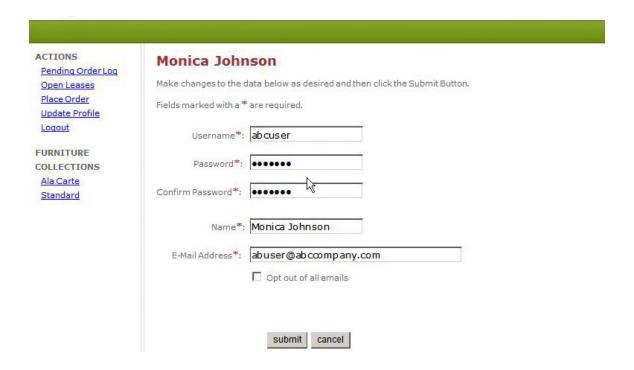


O **Questions and comments.** These 3 fields are not mandatory, but please fill out to provide EFR with any detailed information that will help make your delivery go as smooth as possible. This may address

issues such as methods of entry, including elevator times,  $2^{nd}$  or  $3^{rd}$  floor deliveries, permission-to-enter, etc.

Email confirmations – Once you submit your order, you will receive a system-generated email confirming that your order has been received. Once your order has been granted final approval by the order desk, you will receive a final email confirming the details of your order.

# **Update Profile Page**



- ✓ **UPDATE PROFILE** This page (see above) gives you the ability to change your personal user and log-in information including: **username**, **password**, **name and e-mail address**. All fields are required to be entered and in addition to you, only the EFR Administrator has access to view or change them for security purposes.
- ✓ **LOGOUT** Takes you back to EFR website home page.

#### Furniture Collection (Package) Page

	Package	e Price Sheet			
	Market(s): Fresno, Portland, San Francisco Furniture Package: Premier - 1 bedroom Package Number: Last Edited: 4/28/11				
	Pieces Included  1 Sofa 1 Chair 1 Cocktail 1 End Table 3 Table Lamp 1 Floor Lamp 3 Artwork 2 Night Stand 1 Dresser 1 Mirror 1 Headboard 1 Dining Table 4 Dining Chair 1 26 LCD TV 1 32 LCD TV 1 TV Stand 1 Queen Bed	Optional Pieces King upgrade Chair Recliner** Sofa to Queen Sleeper Upgrade 3 Piece Desk Set Table Lamp Floor Lamp Night Stand Chest Dresser w/ Mirror Dining Chair Bar Stool** Refrigerator** Microwave Washer & Dryer** 26 LCD TV 32 LCD TV  Fees Delivery Fee Less Than Lease Term Fee (1 mo) Appliance Delivery Fee Adjustment Fee Move Fee Same Day Rescheduling Fee Delayed Stop Fee (Hourly) Pet Hair Cleaning Fee  Package Pricing 3 Month \$350.00			
Housewares Pricing Deluxe \$180.00  * not available in all markets					

✓ FURNITURE COLLECTIONS (packages) – Each customized package that was created specifically for you will be listed here. If you click on the package, it will display the packages as created by number of bedrooms. By clicking on the 1, 2, 3 or 4 bedroom package, it will open another window displaying that package (see above example). It will show you the market(s) that the package is available to be ordered, the package name, and package number at the top. On the left side, it will list the inventory items that make up the package. On the right side, it will list the available add-ons and individual price per item. At the bottom of the page, it will list the monthly pricing per length of lease term that is available with that package including any miscellaneous fees. This page is available to print.