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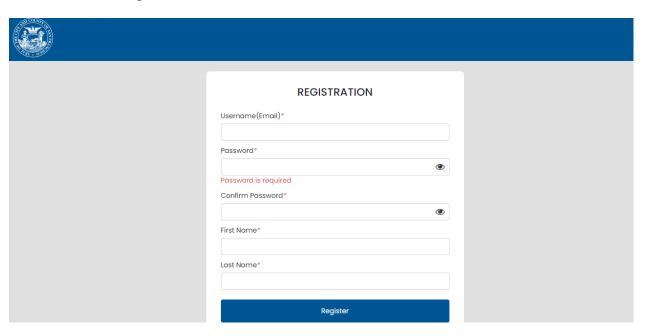


1. Getting Started

Access <u>portal.sfrb.org</u> where you see the landing page as such:

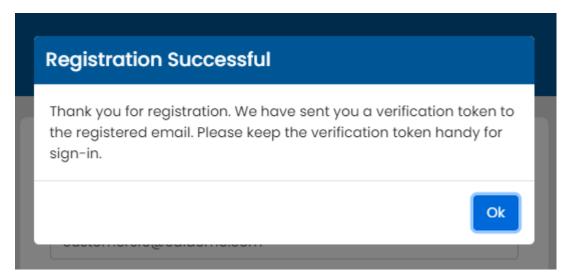


- NOTE: If this is your first time using the portal continue here. If you already have an account, please log-in and go to step 2 in the manual.
- Click on the "Register"

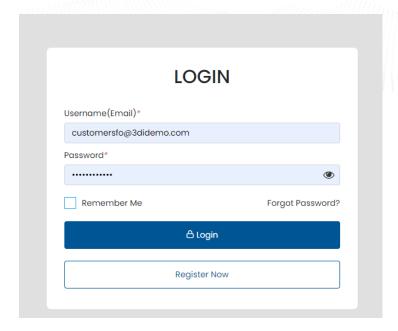


- Enter information
- NOTE: (Password requirements are: Password must contain at least 8 characters of the following character types: Upper Case (A-Z), Lower Case (a-z), Number (0-9), and Special Character (!@#\$%^&*).
- Click "Register"



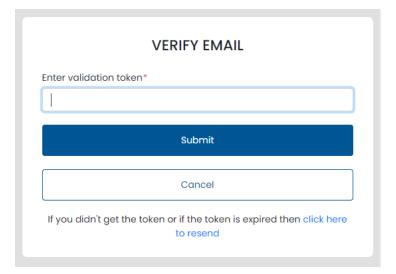


- Click "Ok" in the pop-up, to receive verification token in your email inbox. NOTE: The
 token will be sent to the email address you used to register with. Please check your
 spam/junk folders in case the token was sent there.
- You will then see a "Login" pop-up.
- Enter the username (email) and password you used to register. NOTE: In order to login, you must have completed the registration steps above. Once you complete, this, a popup will ask you for your token from your email address.



Click "Login"

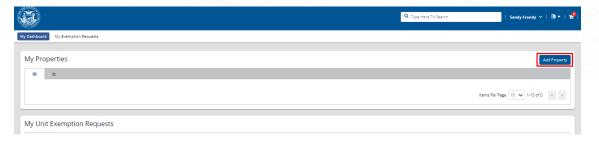




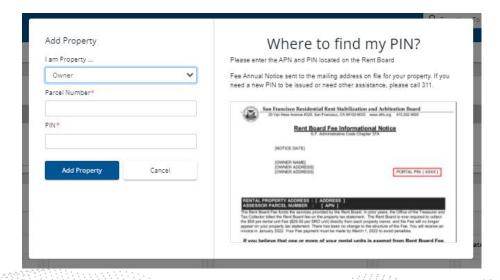
- Input the token you received in your email
- Click Submit

2. Add a property

- Login and access your dashboard
- Click on "Add Property" on the right hand side

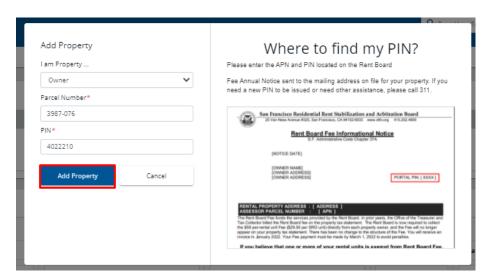


- In the pop-up, enter your parcel number and PIN
- NOTE: refer to image to see where to find your PIN

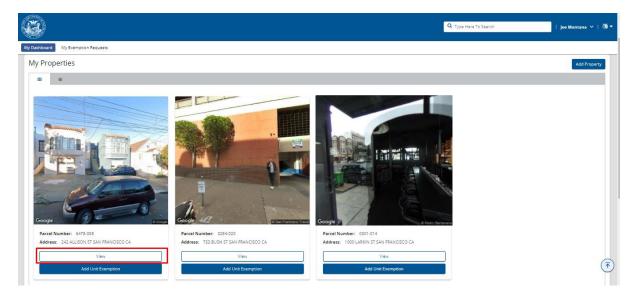




Click "Add Property"



• You will be taken to your dashboard where you will see your successfully added property



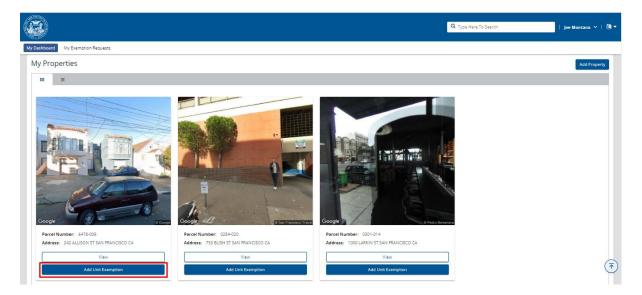
3. View Property Details Page

- On the property, click the "VIEW" button
- Scroll through the page and view property information

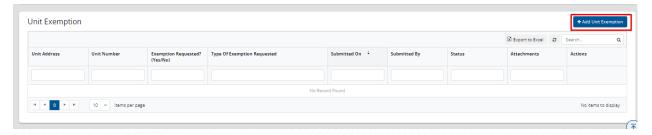
4. Submit exemption request

 In order to submit an exemption request, either click on the "Add Unit Exemption" button located on the image of your added property card OR





• Scroll down to the "Unit Exemption" box and click on "Add Unit Exemption" on the right hand side



- In the pop-up you will enter information as listed below
 - o Enter your property address
 - o Enter your unit number (if any)
 - Select an exemption type
 - o Enter a comment (optional)
 - Upload supporting document(s) (mandatory depending on the exemption type selected)
 - o Enter your name for the penalty of perjury and enter today's date





Click "Submit"





- Your entered information will be in the "Unit Exemption" grid
- Now you have completed the steps to add a unit exemption request and it will be sent to SFO team for review

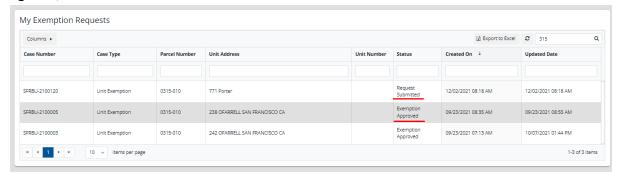
5. View details and track status of the submitted exemption request

 From dashboard, click on "My Exemption Requests" located at the top near the "My Dashboard" tab

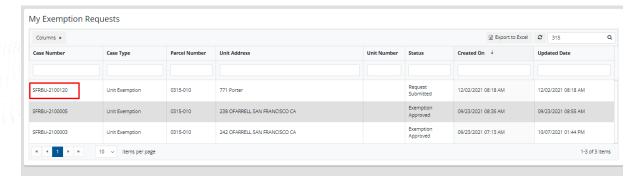




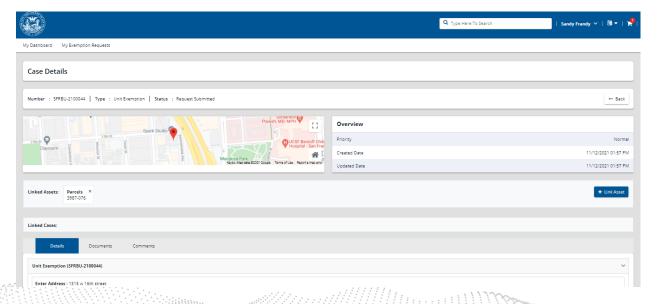
• "My Exemption Requests" grid will show all the parcels for which you filed an exemption against, their details and the status.



- Here you can sort each column by clicking on it and you could view all your requests.
- To see more details about each parcel, click on the case number in the grid to be taken to the details screen



• The case details screen looks as such:



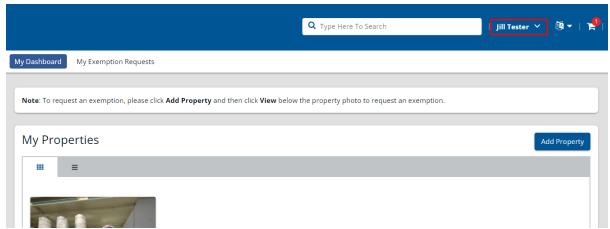
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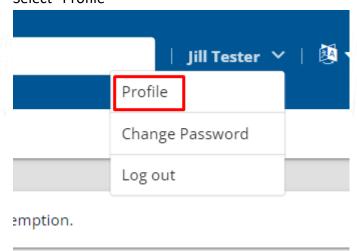
• Scroll through the page to see details including case number, type and status, linked assets, map location of property, details, documents, and comments against the case.

6. Updating Contact Information

• From the dashboard click on your name in the top right hand corner

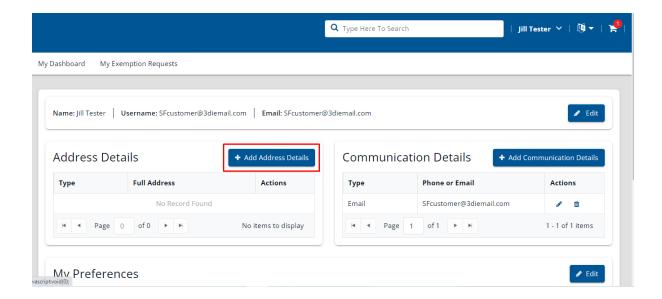


Select "Profile"

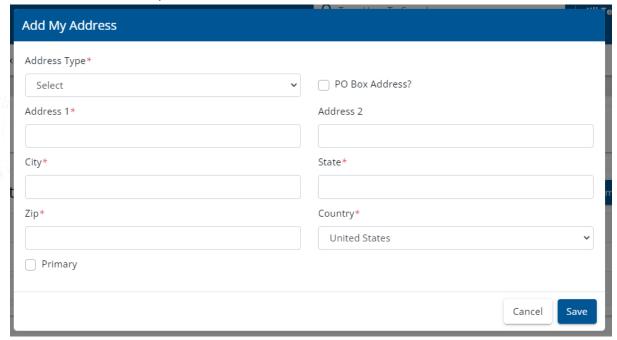


Click on "add address details" to update personal address information



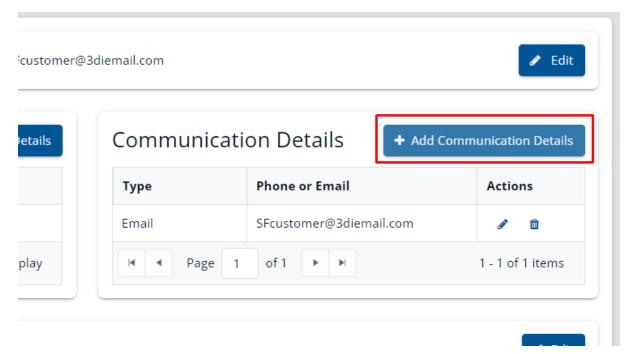


• Fill in the fields to add your address details

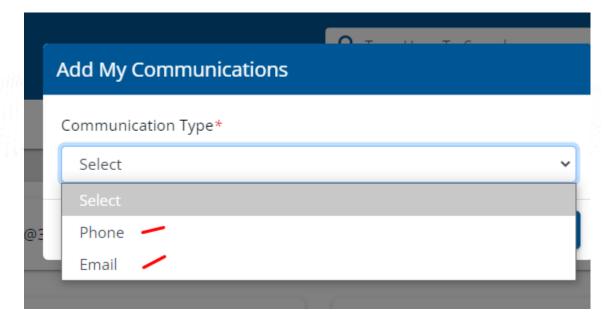


- Click save and you will see the added address in the widget
- To update email address, click on "add communication details"



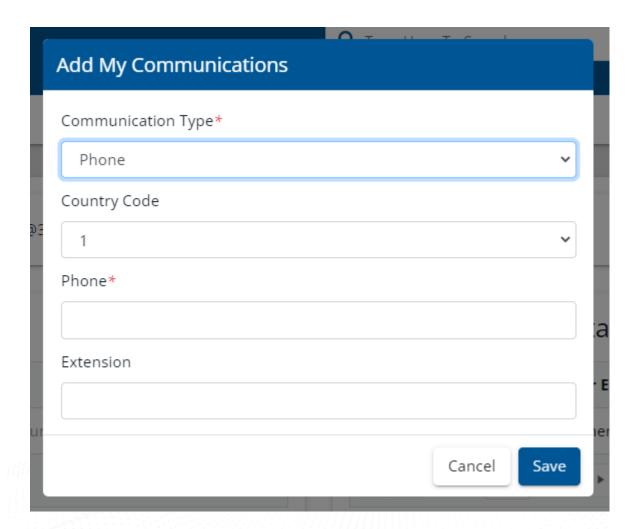


In the pop-up select if you want to update email or phone

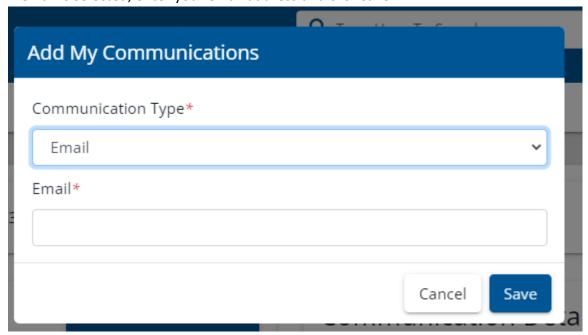


• If phone is selected, enter the following details and click save.





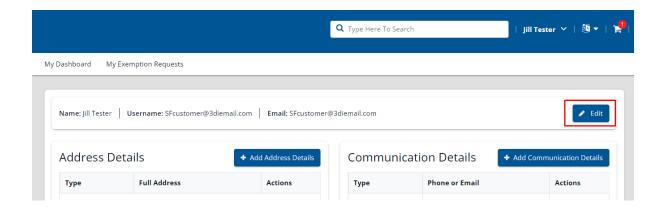
• If email is selected, enter your email address and click save



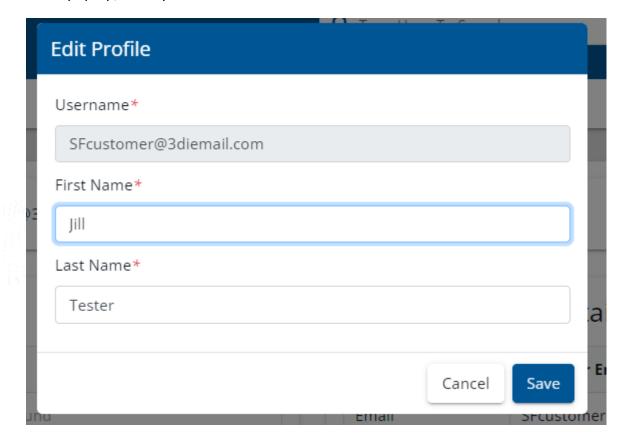
If you need to edit first and last name, use the "edit" button

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• In the pop-up, enter your first and last name and click save

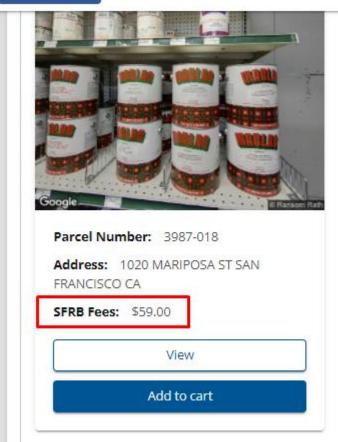


7. Viewing a Payment Obligation

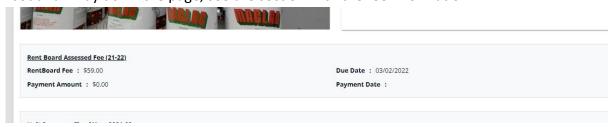
From the customer dashboard, look at the added parcel and see the SFRB fee listed



My Dashboard My Exemption Requests



- To see more detailed information, click "View"
- About half way down the page, see the section with the fee information

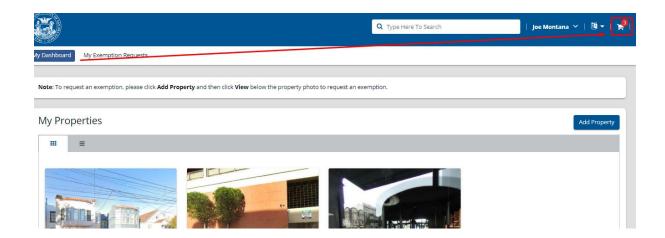


8. Add to Cart

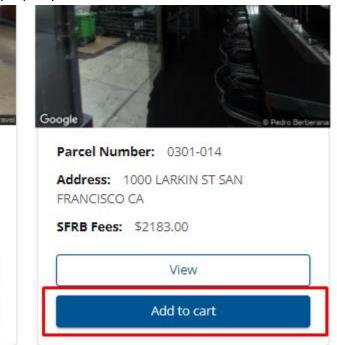
- From your dashboard, see the added property
- Look at the shopping cart located at the top right hand side
- By default, if fees are applied to your added properties, then they will appear in the cart

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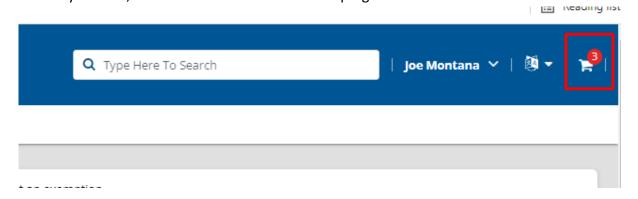




 If you do not see the property in your cart, you can click on "Add to Cart" from the property card



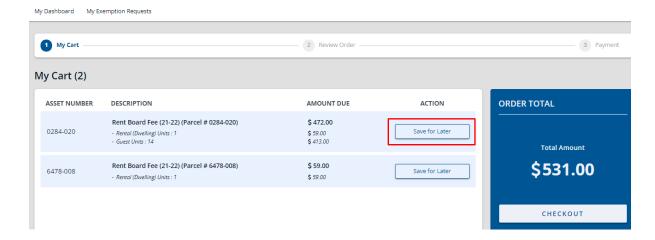
• To view your cart, click on the "cart" icon at the top right hand side.





9. Remove From Cart

Once you are in your cart, you have the ability to remove a parcel from your cart



 Once you click on "save for later", the parcel is removed from your cart and is added into a "save for later" bin.

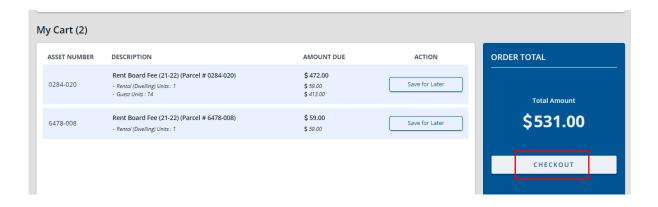


• When in the "save for later" bin, you can use the "Add to Cart" button to move it back to your cart



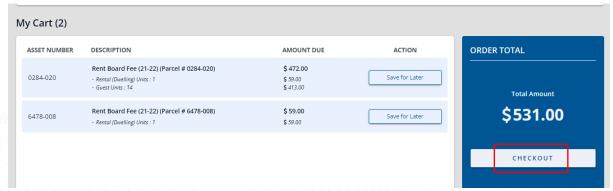
• You will see the parcels and amounts in the cart and could click on "Checkout" to proceed with payment.



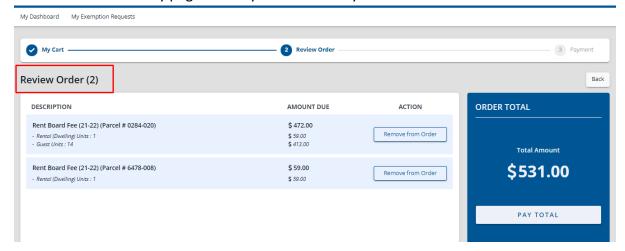


10. Checkout Process

• From your cart, you click "Checkout" to proceed with payment

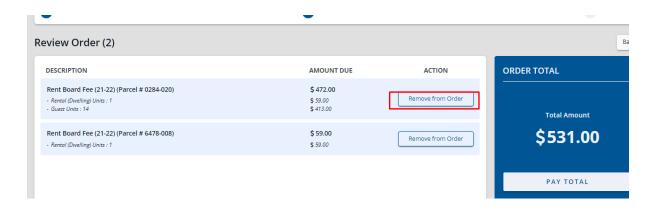


You will see a summary page where you can review your order

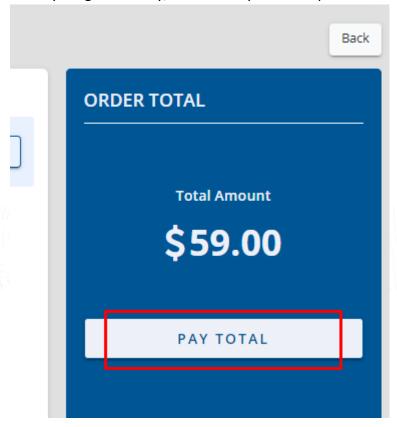


• From here, you could remove a parcel from the order if you desire to do so by clicking on "Remove from Order"

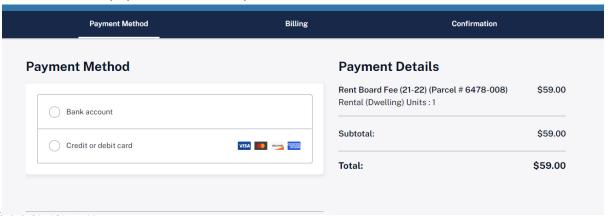




• If everything looks okay, click on "Pay Total" to proceed



You will select a payment method to proceed



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- You can pay with a credit or debit card or bank account
- For bank account, you will need to accurately enter the following information:

Name on bank account

Routing number

Confirm routing number

Account number

Confirm account number

Bank account	
Name on bank account	
Routing number	What is this?
Confirm routing number	
Account number	What is this?
Confirm account number	

• For Credit/Debit card, you will need to enter the following information:

Name on Card

Credit card number

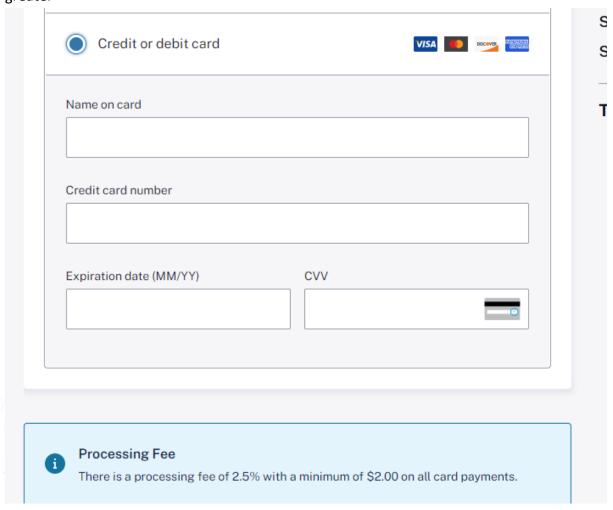
Expiration date

CVV code



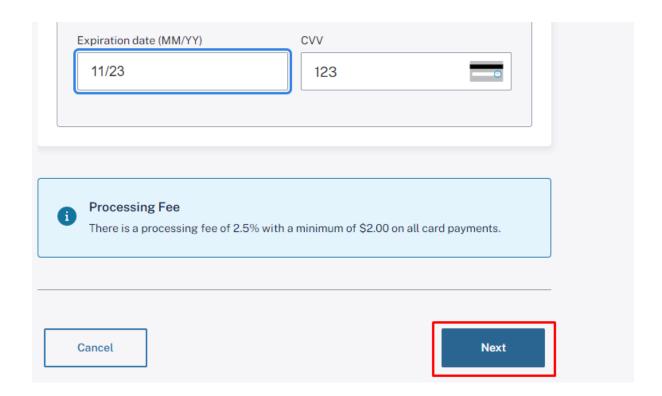


NOTE: All credit/debit card payments have a processing fee of 2.5% or \$2, whichever is greater



 Once all the information is entered (for bank account or credit/debit payment), click "Next".





You will then need to enter customer billing information including:

Country

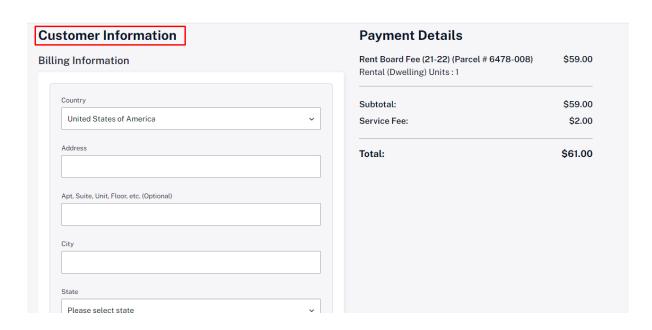
Address

Apt, Suite, Unit, Floor, etc. (optional)

City

State

Zip code

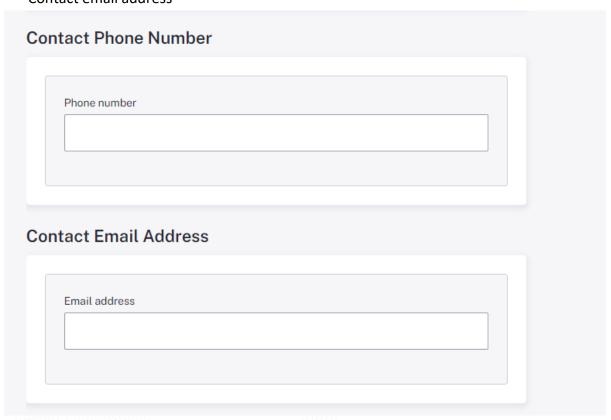


Below the address information, you will enter contact information including:

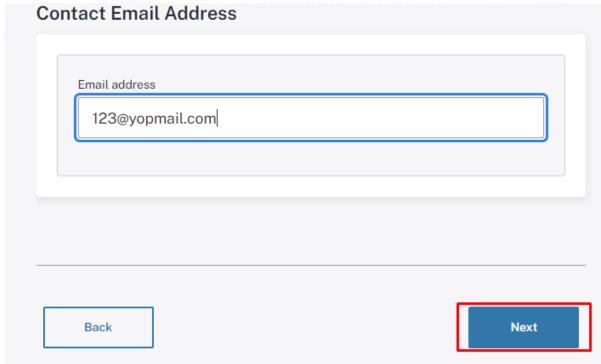
Contact phone number



Contact email address



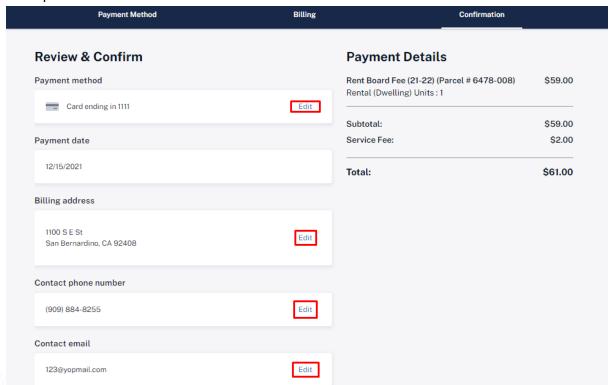
• Once you enter the contact information, click "Next" at the bottom of the screen





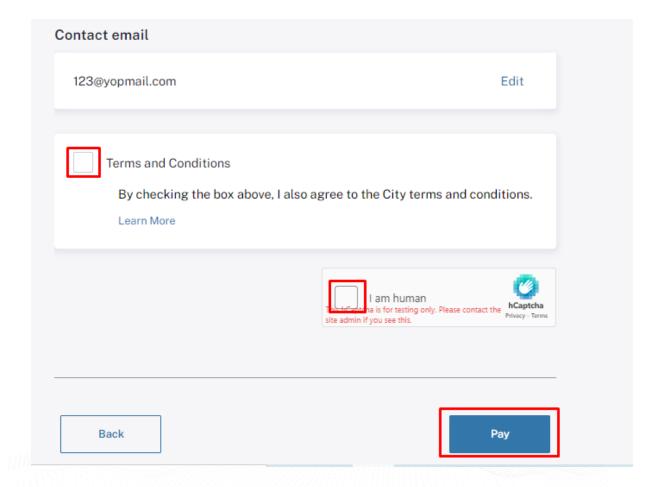


You will see a confirmation page where you could review all your information. When
reviewing your information, if you need to edit any of the fields, you could click on "Edit"
and update the information



• If everything looks accurate, scroll to the bottom of the page and check the box for the terms and conditions and verify that you are human by checking the captcha box





- Once you have checked the boxes, click "Pay"
- You payment has been made and you will see a confirmation screen as such:



Thank you for your payment!

Your transaction number is 70014558.

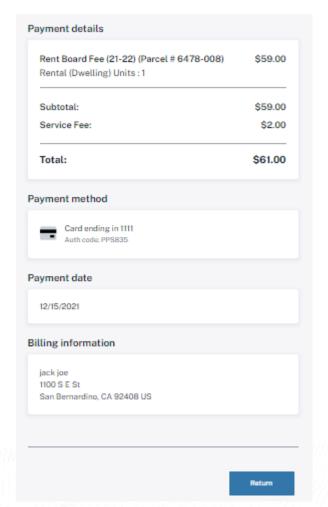
We've sent a confirmation email to 123@yopmail.com. If you do not receive a receipt, check your spam folder.

Please contact customer service at rentboard@sfgov.org or (415) 252-4600 if you have questions about your payment.

 You could scroll down and see the payment details, parcel information, payment method, payment date and billing information



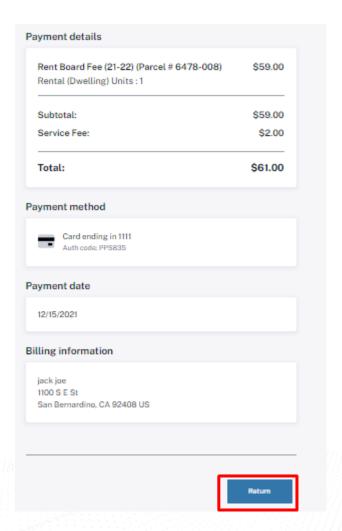




Click the "Return" button to go back to home page







- Clicking "Return" will take you to a screen that verifies that your payment was successful.
- From here, you could click on "Go to Dashboard" to be taken back to dashboard



My Dashboard My Exemption Requests

Payment Successful!!!

Thank you for the Payment.

Go to Dashboard