Investor
Management Portal

Collaboration portal for property management companies

Designed for M365 and SharePoint

Investor Portal

Investor portal management streamlines the sharing of critical information with investors using a secure Online platform. This fosters transparency, trust, and reduced risk of errors. Using Titan workspace's solution property management companies can efficiently share information, manage internal document controls, and provide investors with real-time access to their investment details.

Impact of Efficient Investor Management Portal

- ✅ Improved Investor Communication
- ✅ Increased Investor Engagement
- ✅ Enhanced Investor Satisfaction
- ✅ Reduced Investor Relations Costs
- ✅ Improved Investor Due Diligence
- ✅ Increased Investment Opportunity Awareness
- ✅ Improved Investor Reporting

Benefits of managing Investor portal with Titan Workspace

- ✅ Gives investors insights related to property
- ✅ Set document permissions for Read, Edit, Download, and Print
- ✅ Document version control and access
- ✅ Property-based document filing
- ✅ Alerts and notifications for all collaborators
- ✅ Investors don't need an Office365 account or license
- ✅ Eliminate email attachments by sharing in the Investor Portal

Document Management

Document management system (DMS) is an essential tool for real estate management companies, providing a centralized repository for all documents, improving organization and collaboration, enhancing security. With Titan Workspace at the helm, real estate management companies can adeptly manage lease agreements, tenant files, property maintenance, and financial documents, fostering a culture of productivity and profitability.

Impact of Document Management System

- ✓ Property-based repositories
- ✓ Property-based user access permissions
- ✓ Selective document sharing with Investors
- ✓ Document version control and retention policies
- ✓ Streamlined document approvals for investors via the portal
- ✓ Track shared documents and revoke Investor access
- ✓ Integrated e-signatures service

Benefits of choosing Titan Workspace's Document Management System

- ✓ Property-based document organization
- ✓ Granular access control based on property-specific roles
- ✓ Controlled document sharing with Investors
- ✓ Version control for accurate change tracking
- ✓ Streamline the document approval process
- ✓ Track and revoke Investor access to safeguard sensitive documents
- ✓ Integrated e-signatures services

Workflows & Approvals

Workflows are used to automate and streamline many of the tasks involved in managing real estate properties. This can help to improve efficiency, reduce errors, and free up time for property managers to focus on more strategic tasks.

Workflows and Approvals

- ✓ Document approval workflows
- ✓ Budget approvals
- ✓ Purchase request approvals

Benefits of using Titan Workspace's Workflows and Approvals

- ✓ Streamline document approvals with automated workflows
- ✓ Streamline budget approvals with automation
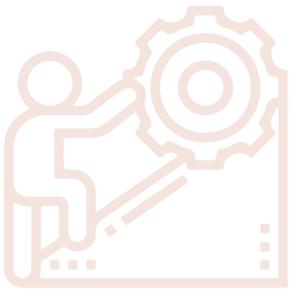- ✓ Fast-track purchase approvals for quick procurement

Success Story

Dayrise Residential is a Houston-based property management company specializing in multi-family housing. They provide exceptional service to residents and investors, managing a portfolio of properties across the greater Houston Area.

Committed to resident satisfaction, they offer a variety of amenities and services. Moreover, the leading property management firm aims to provide superior returns to investors.

Challenges Faced

- ✓ The company struggled with providing secure document access to employees, necessitating various permission levels for different internal users.

- ✓ Efficient and secure communication with investor customers proved challenging, requiring a solution to ensure anonymity and secure data access.

- ✓ The company faced difficulties breaking down organizational silos, highlighting the need to establish a collaborative environment for seamless communication.

How Titan Workspace helped Dayrise Residential

- ✓ Titan Workspace enabled Dayrise Residential to implement a secure document sharing system with role-based access control and file segregation capabilities.

- ✓ Guest user portal of Titan Workspace allowed the property management giant to securely onboard investor customers for confidential document sharing and collaboration.

- ✓ Titan Workspace facilitated closer collaboration within the organisation by launching an Intranet within Microsoft Teams.

Words from our clients

"Before we started using Titan Workspace, our team had to manually send individual reports via email to each of our investors. This process was not only time-consuming, and schedule dependent, but also prone to errors. With Titan Workspace, we've seen a significant improvement in our efficiency. Now, we simply upload our reports to our secure investor portal. Our investors can log in at their convenience and access up-to-date information about their properties. This has not only streamlined our reporting process, but also enhanced the investor experience. We can confidently say that Titan Workspace has significantly improved the way we manage investor reporting at Dayrise Residential."

Director of Information Technology
Dayrise Residential