TAMARIND POINT
GOLF & YACHT CLUB
A PRIVATE ISLAND COMMUNITY

HOME CARE PORTAL

How-to guide

Residential Services & Home Services · Tamarind Point

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GETTING STARTED (EVERYONE)

1. Sign in and find your way around

Everyone

1. Open wellkept.services on your phone or computer and sign in with your email and password.
2. The menu across the top shows the pages for your job. The round badges top left switch between sections (Home Care, RS Laundry, Public Spaces, Awards and others you can use).
3. Tap Site map (top right) to see every page you can open, with a line on what each is for.
4. Tap your picture or initials (top right) for My profile.

Tip: On a phone, add the portal to your Home Screen so it opens like an app.

2. Turn on phone notifications

Everyone

1. iPhone or iPad only: open the portal in Safari, tap Share, then Add to Home Screen, and open the portal from the new Home Care icon.
2. Go to My profile -> Phone notifications and tap Turn on for this device. Allow notifications when the phone asks.
3. A test alert arrives straight away. If it doesn't, tap Send me a test.
4. Under Which alerts?, untick anything you don't want and tap Save choices. Your choices apply to every device you've turned on.

Tip: Turn it on once on each phone or computer you use.

3. Change your profile picture

Everyone

1. Go to My profile -> Profile photo and upload a photo.
2. Drag and zoom the circle to crop it to your head and shoulders, then Save crop.
3. Tick "Make me cartoons of this photo" if you'd like a fun and a realistic cartoon. The Admin makes them for you.
4. When the cartoons are ready, tap the picture you want to use.

4. Find a condo unit or owner

Everyone

1. Open Condo maps from the main menu (or the Site map).
2. Type an owner, unit or house name in the search box, or jump to an association with the I–XIII bar.
3. Tap a number on the building photo to see who owns that unit.

5. Check the next ferry

Everyone

1. The bar at the top of every page shows the next ferry from Tamarind and from Seagrape, counting down. It turns red within 15 minutes.
2. Tap it for the full weekday and weekend schedule.

RS REPS AND PHMS

6. Get a home ready for an arrival

Reps, PHMs

1. My homes and Arrivals show every arrival in the next 14 days, with open tickets and whether the arrival check is done.
2. Do the arrival check in Happy Inspector before the date shown ("Arrival check due by …").
3. Make sure open tickets are closed in Limble, or note why they can wait.
4. On Arrivals, tap All checked: good for this arrival. The home turns green and managers can see it is ready.

Tip: A red "Arrivals not ready" box on My homes lists anything still outstanding in the next 7 days.

7. Add a stay by hand

Reps, PHMs, managers

1. Open the home and go to Stays.
2. Enter who is arriving, the arrival date and (if known) the departure date, then tap Add stay.
3. The stay shows on Occupancy and Arrivals straight away, and the home's team gets a phone alert.

Tip: Most stays come in from the In House Report; add by hand only what isn't on it.

8. Request housekeeping

Reps, PHMs

1. Open the home and tap Request housekeeping (or open Housekeeping from the menu).
2. Choose the days, how many housekeepers and the hours for each day, and the reason.
3. Tap Send request. The RS Manager is alerted and approves or declines it; you see the result on the home.

9. Send laundry and collect it

Reps, PHMs

1. Open the home and tap Request laundry service (or RS Laundry -> Send laundry).
2. Choose who the laundry is for, count the items by size, add the housekeeper, supervisor and photos, then send.
3. The laundry team confirms what arrived. When it's ready you get a notice at the top of the portal, an email and a phone alert.
4. Collect it and mark it collected. My laundry lists everything you've sent, with filters and totals.

10. Check a water flag

Reps, PHMs

1. High use means over 6,000 gallons a day, two or more days in a row (condos 500, empty condos 50).
2. Used after rain means over 2,000 gallons the day after more than 0.1" of rain.
3. Open the home and look at the water chart. Check for a leak, a running toilet, irrigation left on or ignoring the rain sensor, or a pool filling.
4. Report what you found in the home's chat, and raise a Limble ticket if something needs fixing.

HS TECHS

11. OK a ticket handoff

HS techs, HVAC

1. When someone else closes one of your Limble tickets, it shows on My homes and on Ticket handoffs, with who closed it and why.
2. Check the work was done, then tap OK. Managers see which handoffs are still waiting.

12. Get directions to a home

Everyone with homes

1. Open the home and tap Directions, or open Home locations from the Property map page.
2. Enter your password when asked (it stays unlocked for 30 minutes).
3. Tap Apple Maps or Google Maps. To set a home's spot, stand at the driveway and tap Use my location.

13. Print a home spec sheet

Everyone with homes

1. Open the home and tap Spec sheet.
2. It shows the home's size, bedrooms, AC units, pool, meters, 12 months of power and water use, and tickets.
3. Tap View PDF to save or share it.

MANAGERS AND OFFICE

14. Upload a schedule

Managers, office admins

1. Go to Managers (or Office) -> Schedules.
2. Choose the team (RS or HS) and the schedule file (Excel or PDF). If the columns only say Mon, Tue…, enter the week-start date.
3. Tap Upload. The message lists anyone not found or matched closely; fix names on People if needed.
4. Everyone on the new schedule gets a phone alert.

Tip: The RS schedule's Arr / Dep / In house rows also load arrivals.

15. Load the In House Report or 7-day forecast

Managers, office admins

1. Go to Occupancy and upload the In House Report (or forecast) PDF or Excel.
2. Check the matches listed below the upload. Anything not matched to a home is named, so it can be fixed.
3. New arrivals alert each home's Rep and tech.

16. Approve housekeeping

RS Managers

1. You get a phone alert for each new request. Open Housekeeping.
2. Approve or decline each day (or all days of the booking), with a note if needed.

17. Assign homes

Managers

1. Go to Managers -> Assign homes.
2. Choose the homes and the new Rep, PHM, tech or HVAC team, then tap Move homes.
3. Zone sheets and My homes update straight away.

18. Send owner reports

Managers

1. Go to Managers -> Owner reports, choose the month and the home.
2. Preview the report, then Download PDF to send to the owner.

19. Run storm mode

Managers

1. Open Storm and tap Start storm mode, giving the storm a name. Everyone gets a phone alert.
2. Each home shows the prep checklist; the Storm board shows progress for every home.
3. After the storm, tap Storm has passed: start damage check. Then End storm mode when all homes are checked.

ADMIN

20. Load the Vision files (water and electric)

Admin, Utility Admin

1. Go to TPU Utilities -> Load Vision files.
2. Upload the water consumption report (one day per file; several at once is fine) and the electric kWh export.
3. Open Daily report to see use over the limits, flagged meters and 30-day charts. Use View PDF or CSV to share it.

21. Load the sales email and switch an owner

Admin

1. Go to Admin -> Sales and upload the weekly "Sales Contract Updates" email (.eml), or paste its text, then Load sales.
2. For each closed home or condo sale, check the new owner's name and tap Switch owner, or Leave as is.
3. For 6 weeks the owner shows as "New (was Old)" everywhere owners appear.

22. Give or remove access for one person

Admin

1. Go to Admin -> Access and pick the person.
2. Set each page or feature to On, Off or As their role, then Save access. Reset to their role undoes all changes.
3. Use View as (Admin page) to check exactly what they now see. Nothing can be changed while viewing.

23. Track a new build to turnover

Admin, Simone

1. Go to New Construction and load the TP Total Homes workbook (Under Construction tab).
2. Fill in square footage, bedrooms, HVAC and pool for builds turning over soonest. The Ready? column shows what is missing.
3. Tap Reached out once RS has contacted the owner about the Home Care Program.
4. At handover tap Turn over: the facts copy into All homes (and the Home Care home if there is one).

Tip: You get a phone alert 30 days before a turnover if details are still missing.

24. Update a condo association

Admin

1. Go to Condo associations and open the association.
2. Upload the building photo, then Place unit numbers: pick the unit, click the photo where its number goes, and save.
3. Set the insurance cover (interior and exterior, building and liability, or liability only), amounts and expiry.

25. Load the transport email and check who is on property

Admin

1. Save the day's last Transportation Assignments email as a file (.eml).
2. Go to Admin -> Occupancy & transport -> Transport log and upload it (several days at once is fine).
3. Open To allocate: for each booking that isn't a member's, choose Club, HOA, Marina, TPU or Starfish (construction), or a member's party, or member staff (type the role, e.g. Nanny or Chef; they stay on property and count in the member's home). Club, HOA, Marina, TPU and Starfish are Tamarind Point staff who live off property. Leave Remember ticked and the name is allocated automatically next time.
4. On property shows homes occupied and people in each (one row per home, with the In House Report and transport together), member staff in each home, and arrivals that weren't on the In House Report.
5. Report: choose the dates and the sections you want, then Show or PDF.

Tip: Load the In House Report on Occupancy too, so the portal can spot arrivals that weren't on it.

26. Keep the property list up to date

Admin

1. Go to Admin -> Property list and upload the TP Property Overview workbook (.xlsx). Uploading again replaces the list; decisions you have made stay made.
2. Under Owner differences, choose Use the list (All homes changes to the new owner, with the old one in brackets for 6 weeks) or Keep All homes for each one.
3. When a lot or slip sale closes, Admin -> Sales asks whether to update the property list. You can also type an owner straight into the list.

Tip: Members on the list are recognized on the transport email and In House Report even with no home on All homes yet.

27. Request or answer home access

HS techs and Reps

1. HS tech: open the home, tap Request access, pick the day, add times if you have them, say what it's for (and pick the ticket) and send.
2. Rep: the request shows at the top of My homes (and on your phone if Access requests is ticked under Phone notifications). Add a note if needed and tap OK or Not OK.
3. The tech sees the answer on My homes and on the home's page. Homes with no Rep go to the RS managers.

Tip: Never type door or alarm codes into the portal.

28. Add a property manager's reply

Admin

1. Copy the reply from the email (one or several; each starts at "Owner :").
2. Go to Admin -> All homes -> Property manager replies, type the company and paste.
3. Check each home it found (pick it from the list if it couldn't tell) and the details it would save. Details All homes doesn't have yet are ticked; ones that differ are not, so tick them only if the reply is right.
4. Press Save ticked details. The reply is kept, listed under Replies saved.

29. Load the solar meter report

Admin and Utility Admin

1. Save the day's solar meter report from Vision (.csv).
2. The portal works out the day itself: from a day already loaded next to it (the meter readings carry on from one day to the next), or from that day's electric kWh export. Older days can be loaded in any order, as long as they join up with days already loaded.
3. Go to Utilities -> Solar and load it. Several files at once is fine (up to about three per upload). If it can't tell the day, choose it and load that file on its own.
4. Check the flags: tap Add for a home sending power back that isn't on the solar list, and type a home's permitted kW where it has its own size.

Tip: Click a home's name to see its power, water and the weather day by day.

30. Load the water plant report

Admin

1. Save Island Water's "Tamarind Point Daily Water Report" email as a file (.eml).
2. Go to Admin -> Water plant and upload it. Earlier reports quoted in the thread are read too.
3. Check trains operable (red when fewer than 6), tank levels, and distributed against metered use.
4. Add a note on unusual days (e.g. restaurants closed, an event) so the figures make sense later.

31. Change the ferry times

Admin

1. Open Staff ferry and use Change the ferry times.
2. Enter one trip per line (e.g. 7:00 AM – 7:30 AM) for weekdays and weekends, each direction, then save. Everyone sees the new times at once.

32. Share the updates or this guide

Admin

1. Go to What's new. Choose a release and tap Export PDF or Copy for email.
2. For this guide, tap Export how-to PDF. It can be shared with anyone; it has no homes, owners or other private details.