

GENERAL GUIDES

HOW-TO NAVIGATE THE MANAGEMENT PORTAL

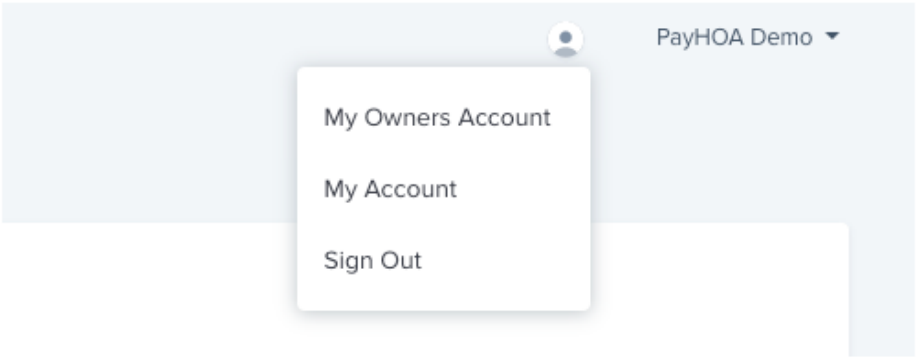
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How to update my contact information

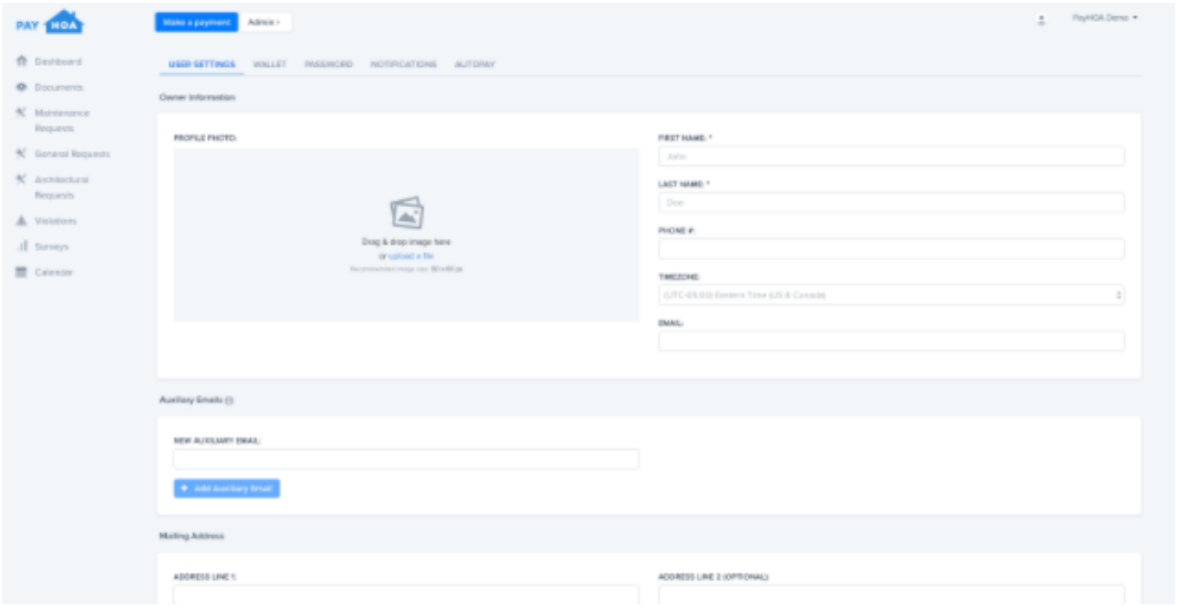
Update name, email, phone, mailing address, etc.

Step 1: Click on the "person icon" at the top right corner of the screen.



Step 2: Select "My Account".

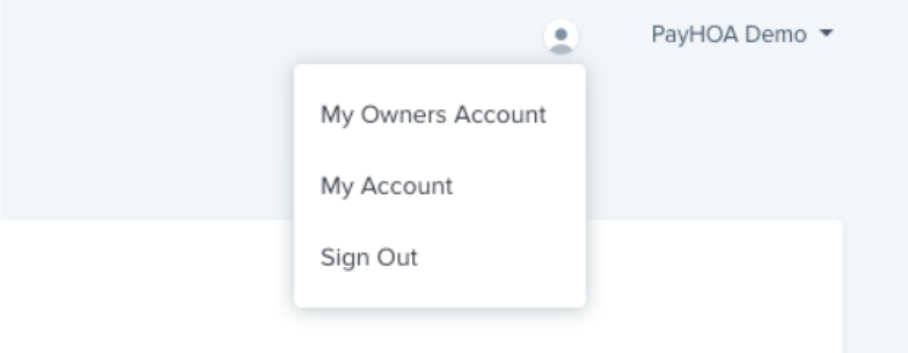
Step 3: Select the tab "User Settings".



How to change my password

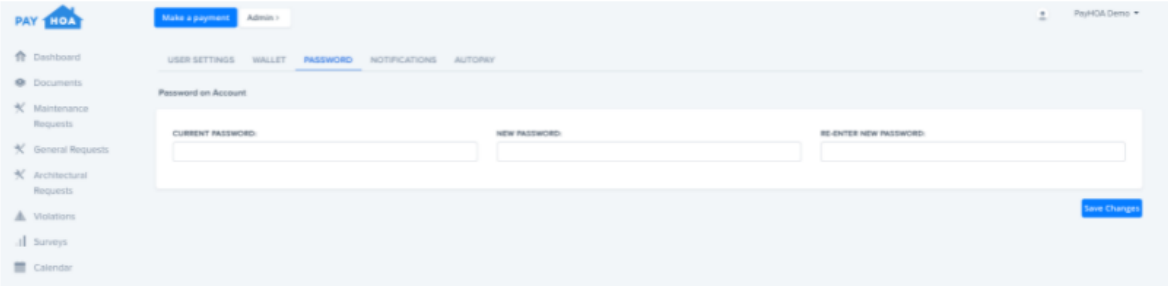
Update your password while logged in

Step 1: Click on the "person icon" at the top right corner of the screen.



Step 2: Select "My Account".

Step 3: Select the tab "Password".

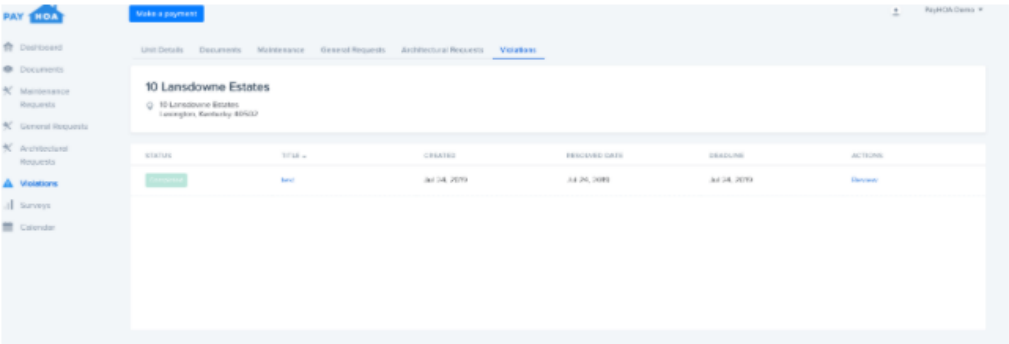


How to manage violation notice

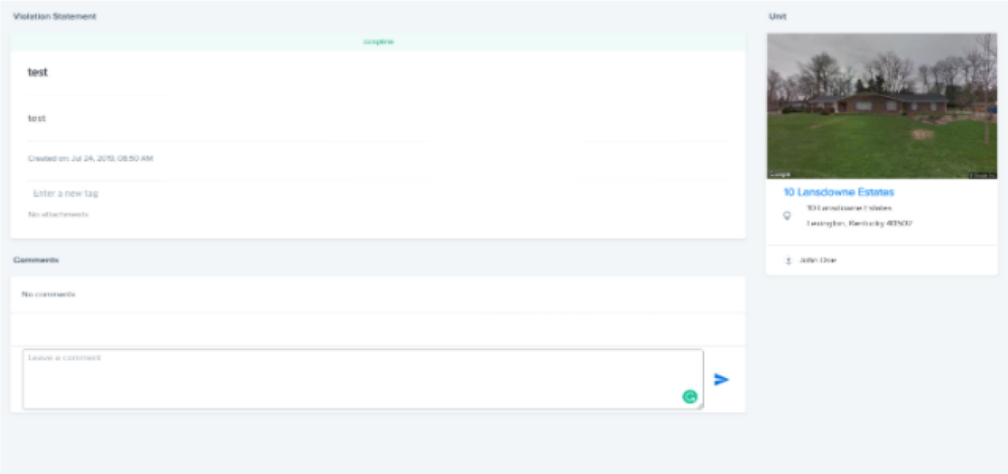
Respond to violations received for your unit(s)

Step 1: Click "Violations" in the main navigation.

Step 2: Click "Review" on the violation record.



Step 3: Here you can add "comments" which will automatically email your note to the association and log it on the violation page.



Step 4: Images and attachments can also be added and stored on the violation record.

Step 5: You will receive email notifications when the association responds to the request and when they mark the violation as resolved.

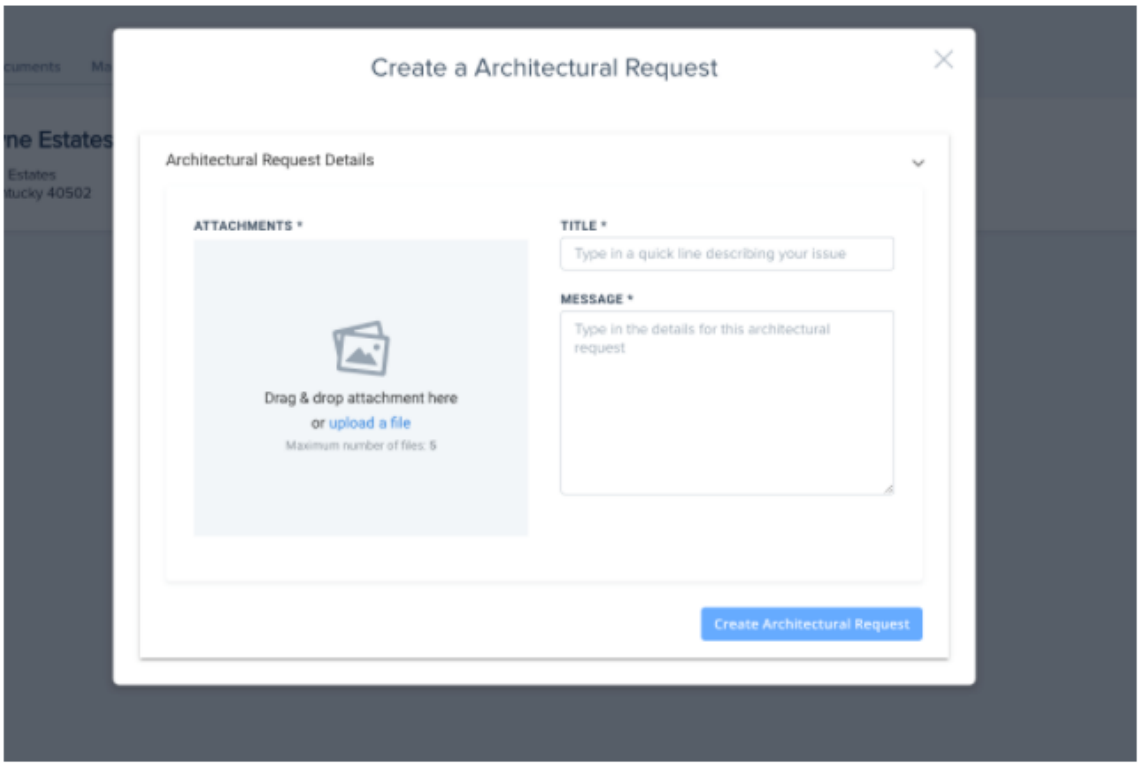
How to submit an architectural request

Submit architectural requests for review and approval

Step 1: Click "Architectural Requests" in the main navigation.

Step 2: Click on "New Architectural Request" in the bottom right corner.

Step 3: Fill in your architectural request title, description, and add any images or attachments that would be useful for the association to know.



Step 4: Once created, you can view the request, add additional comments, upload additional images or attachments.

Step 5: You will receive email notifications when the association responds to the request and when they approve or deny the request.

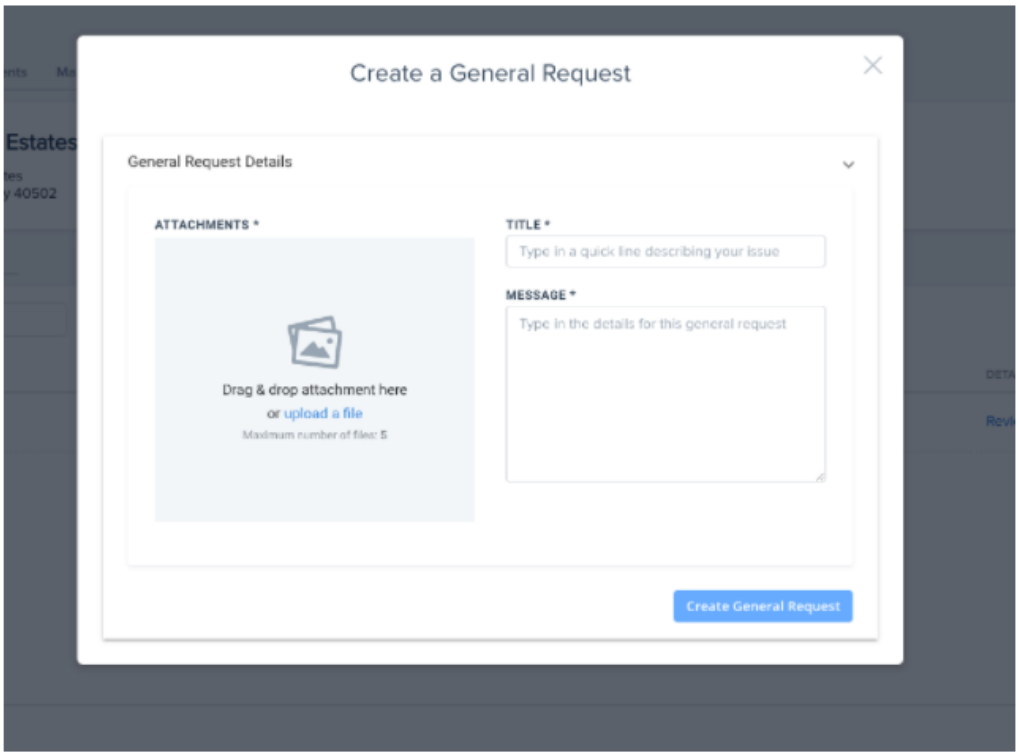
How to submit a general request to your association

Ask questions or submit general inquiries to your association

Step 1: Click "General Requests" in the main navigation.

Step 2: Click on "New General Request" in the bottom right corner.

Step 3: Fill in your request title, description, and add any images or attachments that would be useful for the association to know.



Step 4: Once created, you can view the request, add additional comments, upload additional images or attachments.

Step 5: You will receive email notifications when the association responds to the request and when they resolve the issue.

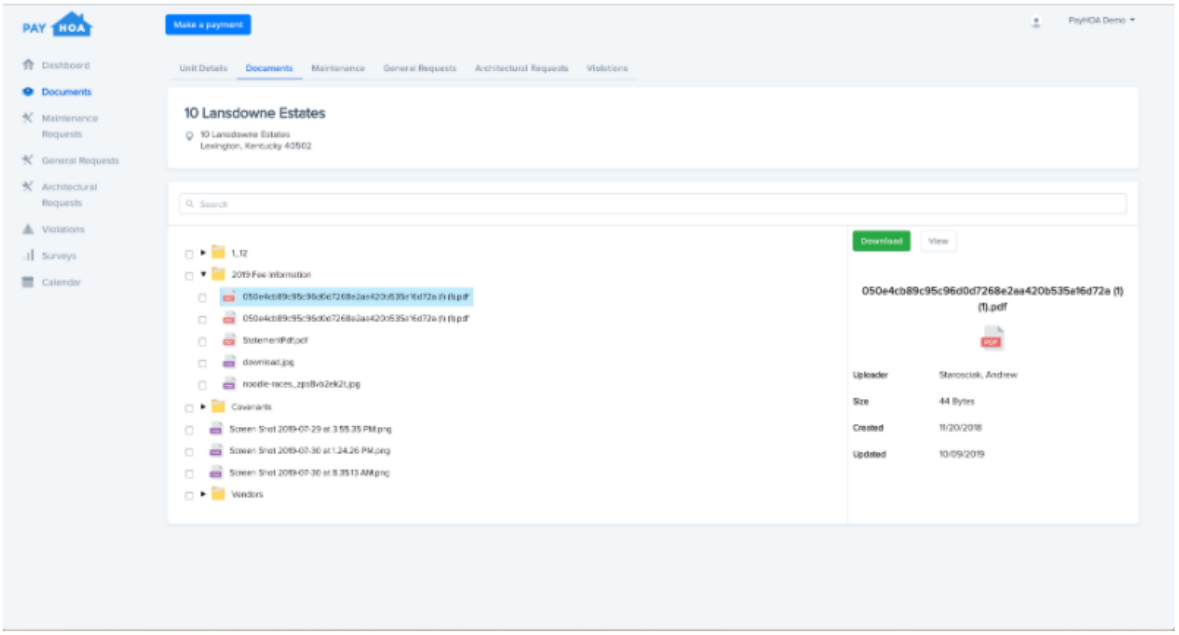
How to view shared documents

Viewing or downloading documents that have been shared with your unit

Step 1: Click "Documents" in the main navigation.

Step 2: Click on the file or folder you would like to access.

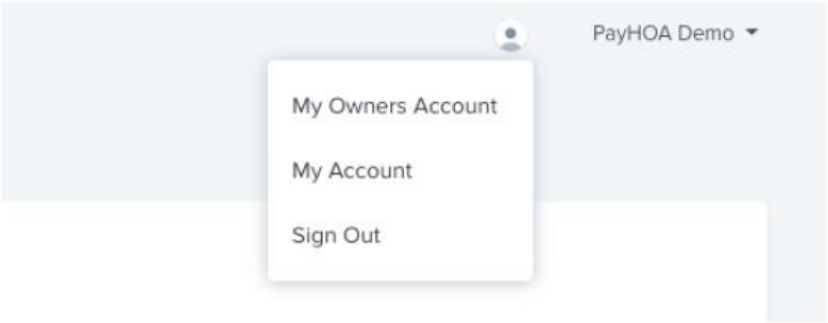
Step 3: Click "View" or "Download" to access the document.



How to add or remove saved payment methods

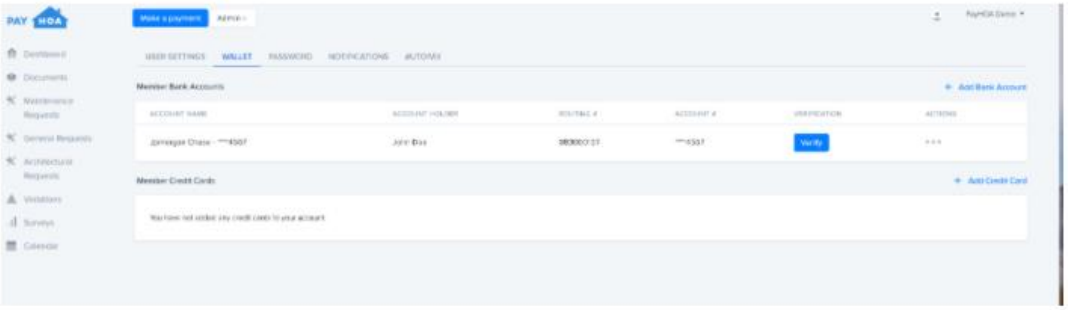
Manage your payment wallet

Step 1: Click on the "person icon" at the top right corner of the screen.



Step 2: Select "My Account".

Step 3: Select the tab "Wallet".



Step 4: Use the blue links on the right to "+Add Bank Account" or "Add Credit Card".

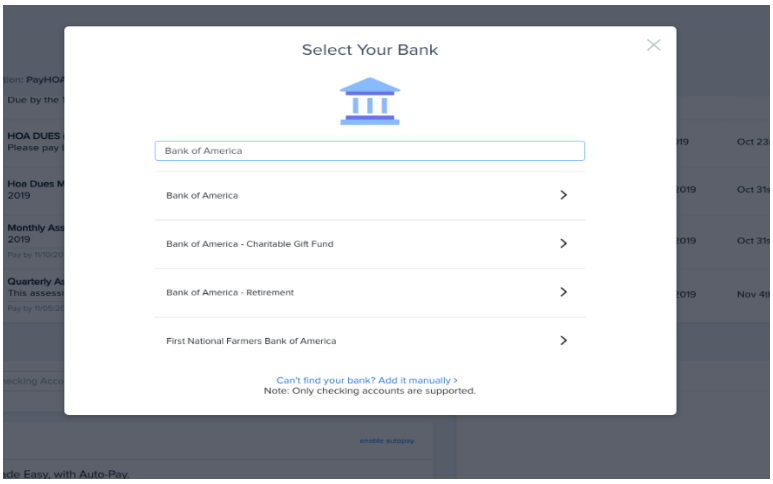
Step 5: Click the three dots under "Actions" to remove an existing bank account or credit card.



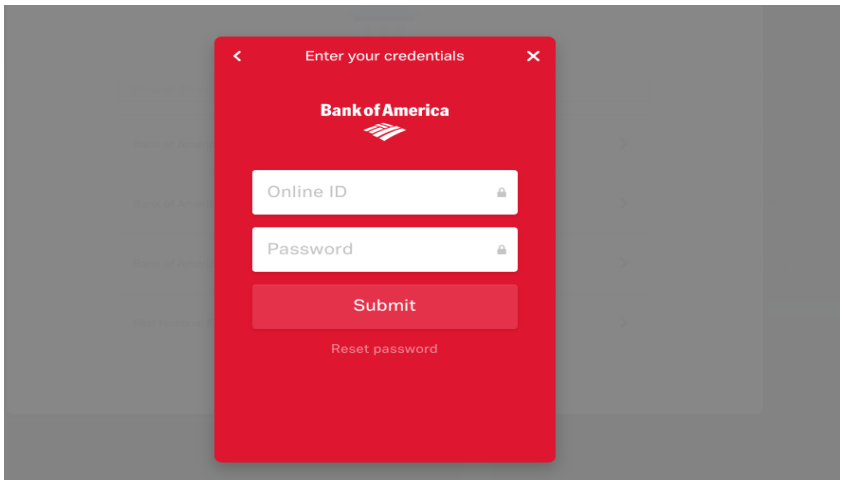
How to pay with an ACH (e-check) using your online banking credentials

Verify account ownership instantly using your online banking

Step 1: Select "New Bank Account" in the payment method dropdown.
Step 2: Search for your bank in the search bar and select it.



Step 3: Login to your online banking.



Step 6: If you have multiple accounts, select which bank account you want to connect.
Step 7: Your account will be instantly verified and available to make payments or enroll in autopay.

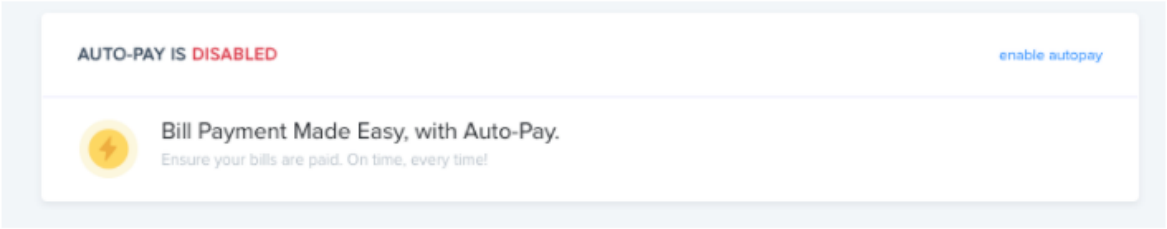
How to enroll in autopay

Enable autopay to ensure on-time payments

Note: Autopay will pay all outstanding invoices on the due date, up to the maximum amount you set.

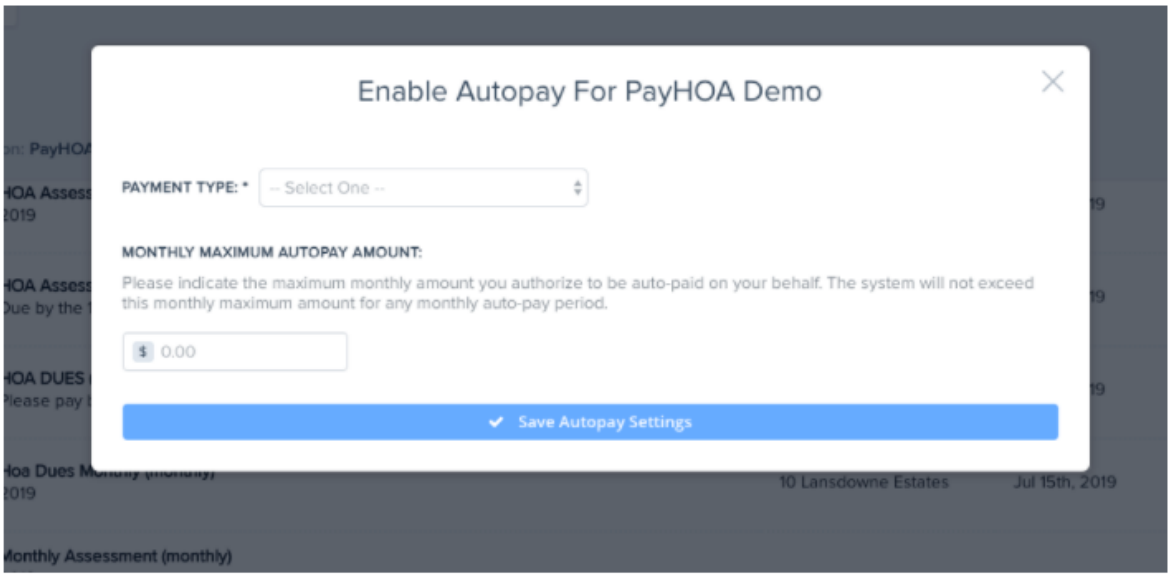
Step 1: Click the "Make a Payment' button at the top left of the page.

Step 2: Click "Enable Autopay"



Step 3: Agree to autopay terms and conditions.

Step 4: Choose your payment method and type in your maximum amount.

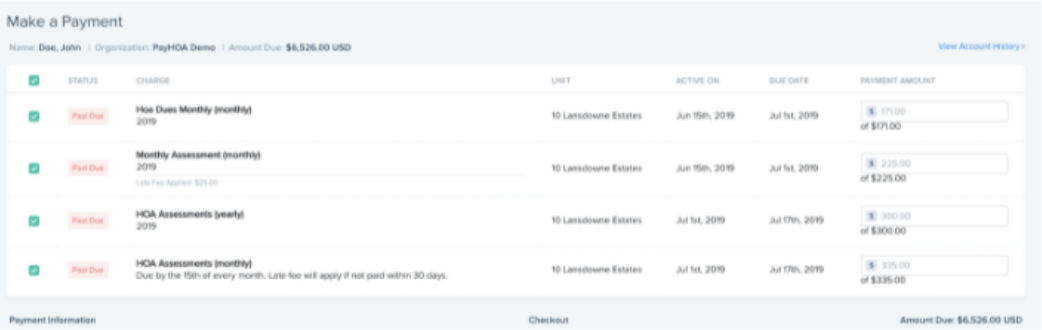


How to pay an invoice with an ACH (e-check)

Make payments online via ACH directly from your bank account

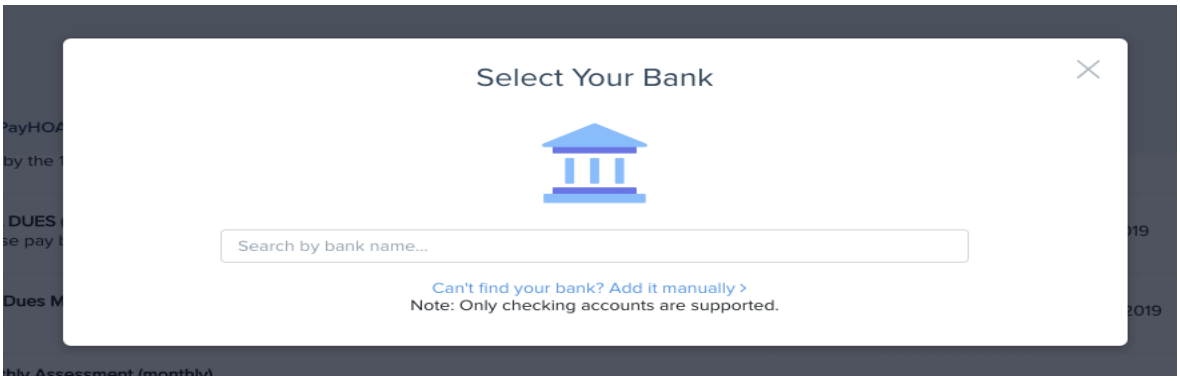
Step 1: Click on the blue "Make a Payment" button at the top of the page.

Step 2: Select the charges you want to pay. (Amounts of each selected charge can also be modified using the text field by payment amount)

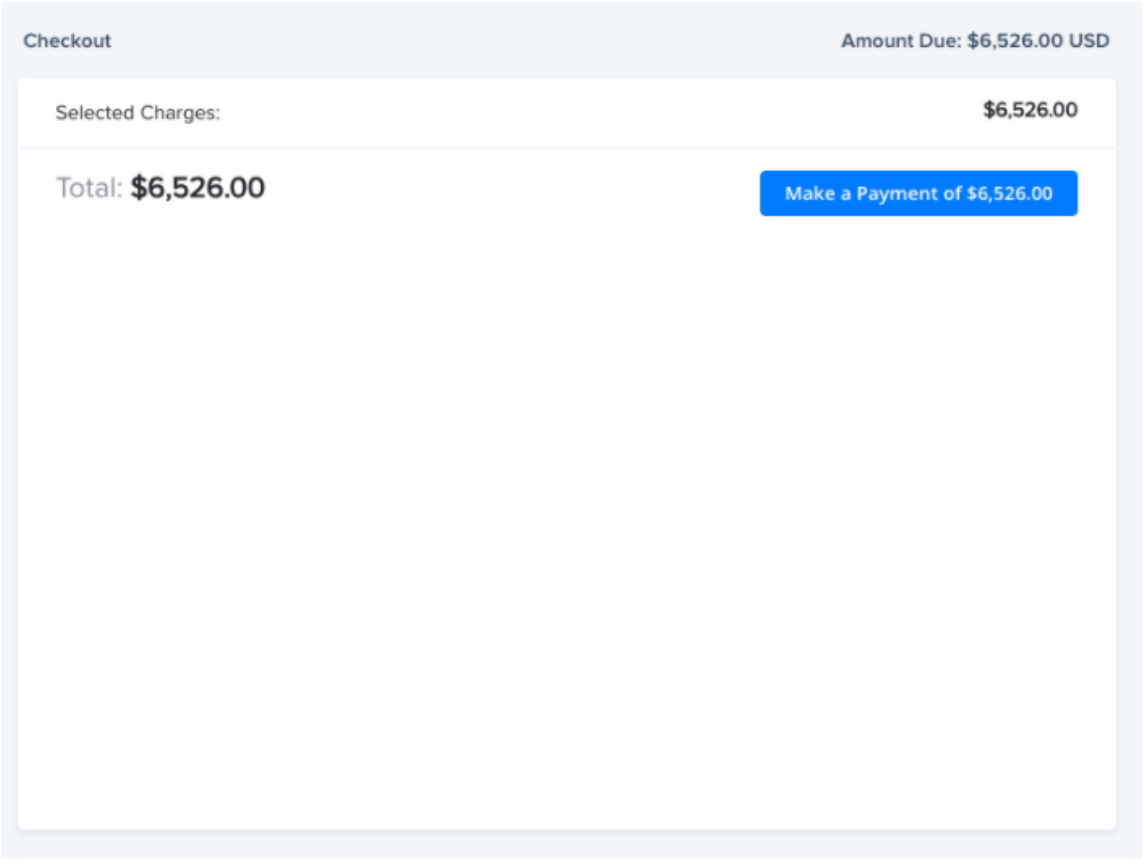


Step 3: Select an existing bank account from the payment selector dropdown or select "New Bank Account".

Step 4: Bank accounts require verification of ownership prior to processing payments. You can verify your account instantly using your online banking credentials. Or you can add a bank account using the account and routing numbers. To do this, click "Add it manually" referenced in the image below. (Using your account and routing number requires microdeposit verification which takes 1-2 business days. More detail can be found in the "Microdeposits" help article.)



Step 5: Confirm the amount you are paying and click "Make a Payment".

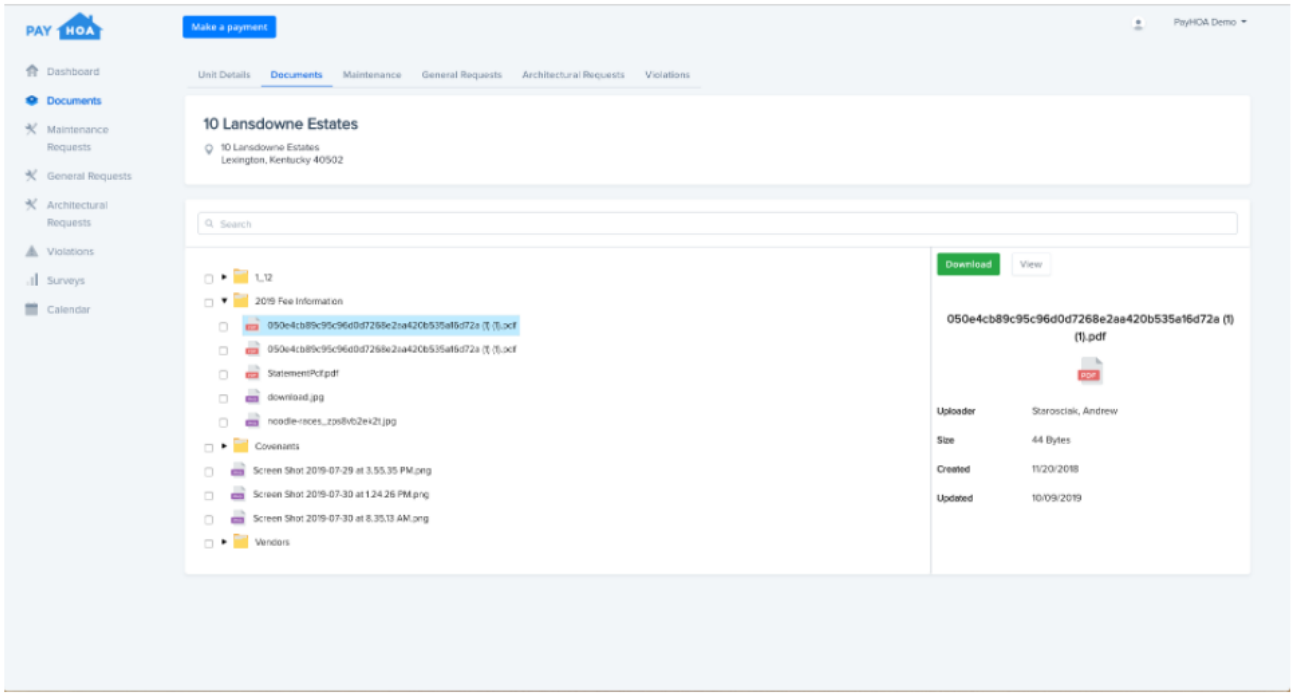


Step 6: You will receive email receipt and a confirmation page that the payment has been successfully processed.

How to view shared documents

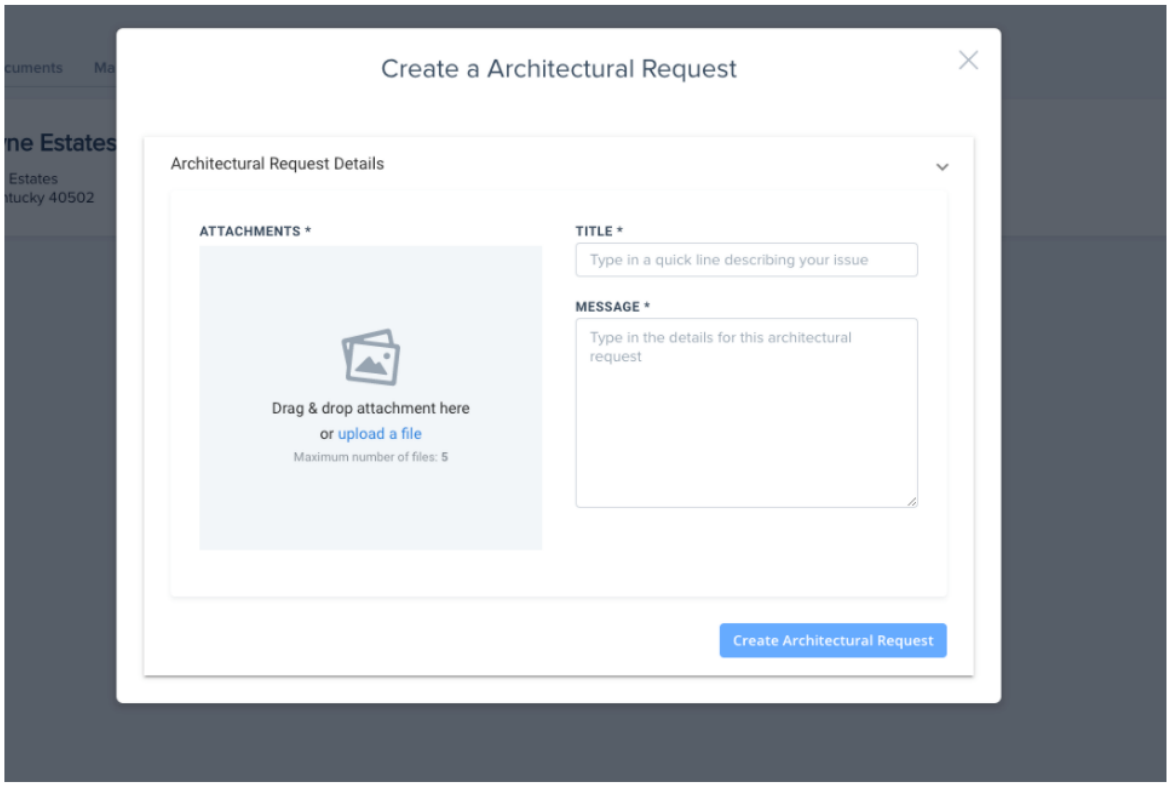
Viewing or downloading documents that have been shared with you.

- Step 1: Click "Documents" in the main navigation.
- Step 2: Click on the file or folder you would like to access.
- Step 3: Click "View" or "Download" to access the document.



Enter an Architectural Request directly into the management tool.

- **Step 1:** Click "Architectural Requests" in the main navigation.
- **Step 2:** Click on "New Architectural Request" in the bottom right corner.
- **Step 3:** Fill in your architectural request title, description, and add any images or attachments that would be useful for the Architectural Committee/Board to know.
- **Step 4:** Once created, the homeowner can view the request, add additional comments, upload additional images or attachments.
- **Step 5:** The homeowner will receive email notifications when the Architectural Committee/Board responds to the request and when they approve or deny the request.



Enter a General Request directly into the management tool.

- **Step 1:** Click "General Requests" in the main navigation.
- **Step 2:** Click on "New General Request" in the bottom right corner.
- **Step 3:** Fill in your architectural request title, description, and add any images or attachments that would be useful for the Board to know.
- **Step 4:** Once created, the homeowner can view the request, add additional comments, upload additional images or attachments.
- **Step 5:** The homeowner will receive email notifications when the Board responds to the request and when they resolve the request.

