Homeowner Portal

Dear Association Member:

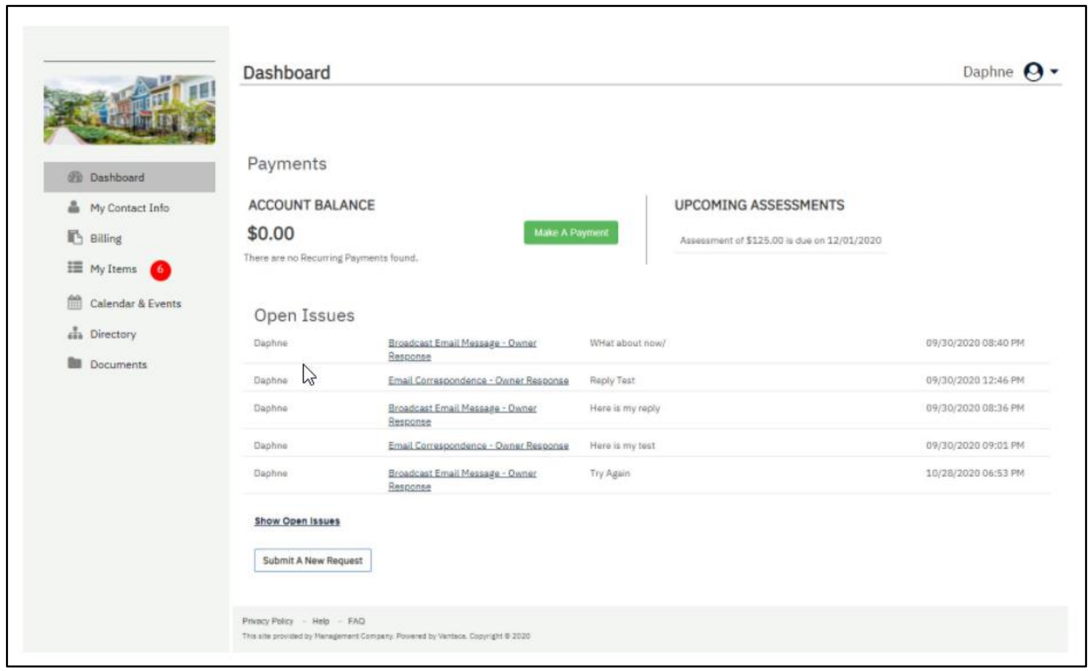
We are excited to announce that the homeowner portal—which allows you to access your account information and communicate with your management team—has been updated with a new look and a few new features. This document will walk you through the updated pages and functionality.

Logging In to the Portal

Go to my.managementtrust.com and log in with the email address and password you have previously used. If you do not yet have a login, please contact your management team.

Dashboard / Homeowner 'Home' Page

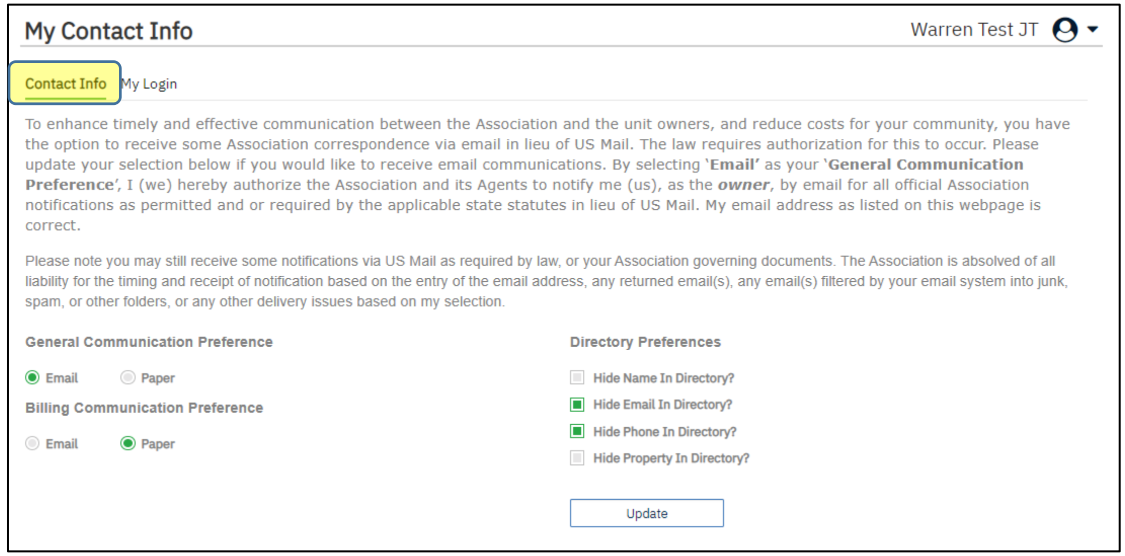
This will be your 'landing page' after logging in to the owner portal. The dashboard gives an overview of your account information, balance, and upcoming scheduled assessments and payments, if applicable. Owners can also view open and pending processes and activity for their property, and navigate to the other portal pages.

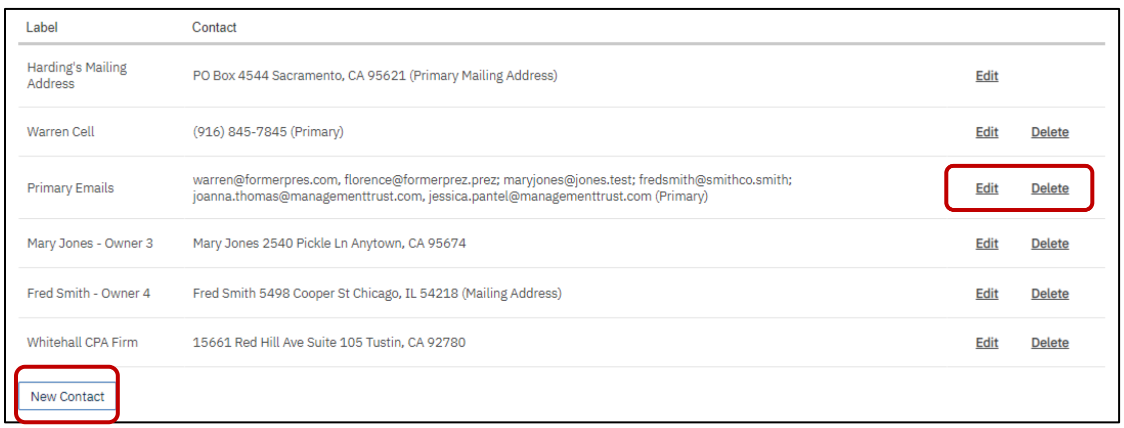


My Contact Info Page

When navigating to the '**My Contact Info'** page, by default the Contact Info tab will open. On this page, you can update your mailing address, as well as add, edit, or delete contact records for your property. Contact records include mailing addresses, emails, and phone numbers. You may also manage your communication preferences and directory preferences. Please note that the directory preferences only apply to community directories available through the portal, and this feature is **NOT** currently enabled on our portal.

The Contact Info page includes disclosure language for receiving communications via email. When you change your communication preference(s) to Email, you are agreeing to the disclosure noted on this page.



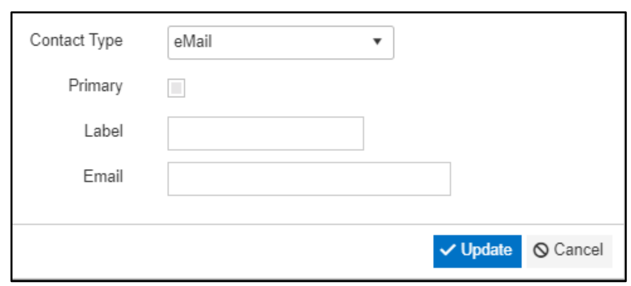


Label	Contact		
Harding's Mailing Address	PO Box 4544 Sacramento, CA 95621 (Primary Mailing Address)	Edit	
Warren Cell	(916) 845-7845 (Primary)	Edit	Delete
Primary Emails	warren@formerpres.com, florence@formerprez.prez; maryjones@jones.test; fredsmith@smithco.smith; joanna.thomas@managementtrust.com, jessica.pantel@managementtrust.com (Primary)	Edit	Delete
Mary Jones - Owner 3	Mary Jones 2540 Pickle Ln Anytown, CA 95674	Edit	Delete
Fred Smith - Owner 4	Fred Smith 5498 Cooper St Chicago, IL 54218 (Mailing Address)	Edit	Delete
Whitehall CPA Firm	15661 Red Hill Ave Suite 105 Tustin, CA 92780	Edit	Delete

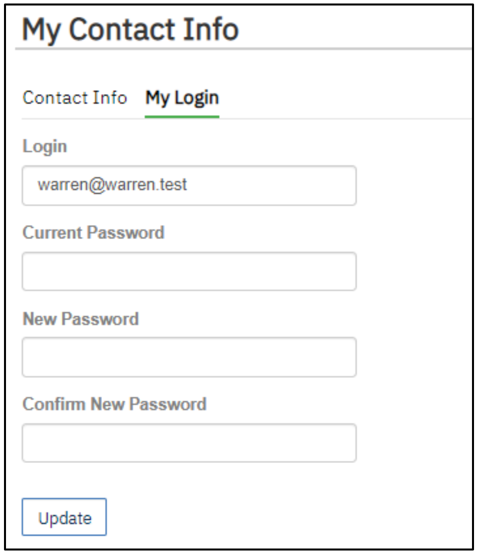
New Contact

In the lower half of the **My Contact Info** page, you can manage contact info records for email, phone numbers, and mailing addresses.

To edit or delete a contact record, click the **'Edit'** or **'Delete'** link next to the record.



To create a new contact record, click the '**New Contact**' button, enter the appropriate information, and click 'Update' to save the record.



Under My Contact Info > My Login, you can manage your login email and your password for the site.

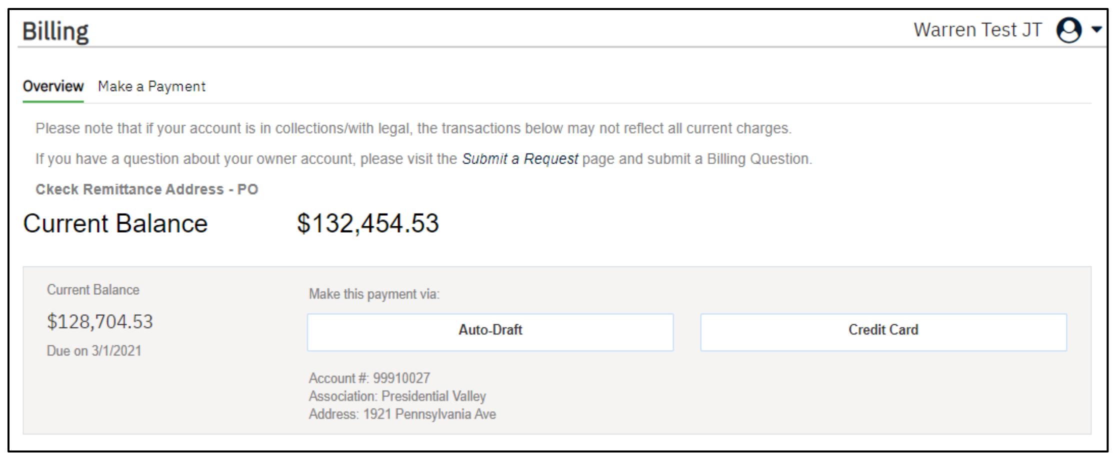
Billing Page

On the **Billing** > **Overview** page, you can view your current account balance(s), as well as make payments and view/print your account history/statement. If you own multiple properties, please contact your management team about the possibility of merging those accounts so you can view and manage them together.

Owners can make payments using any of the payment methods listed below:

- ✓ Auto-Draft (ACH)
- ✓ One-Time eCheck
- ✓ One-Time Credit Card

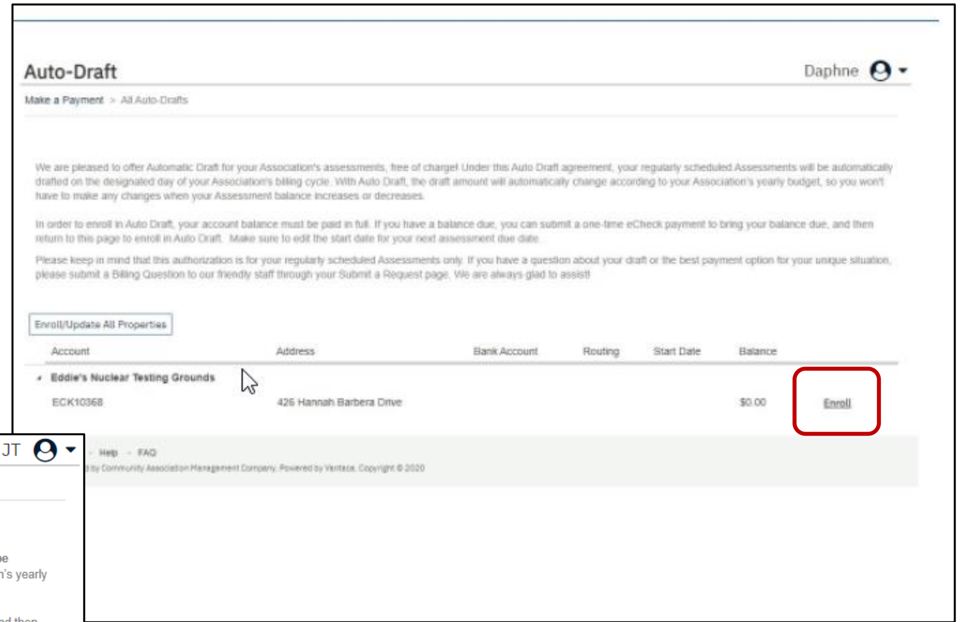
Please note that an account must have a **zero balance** before you can enroll it in Auto-Draft payments.

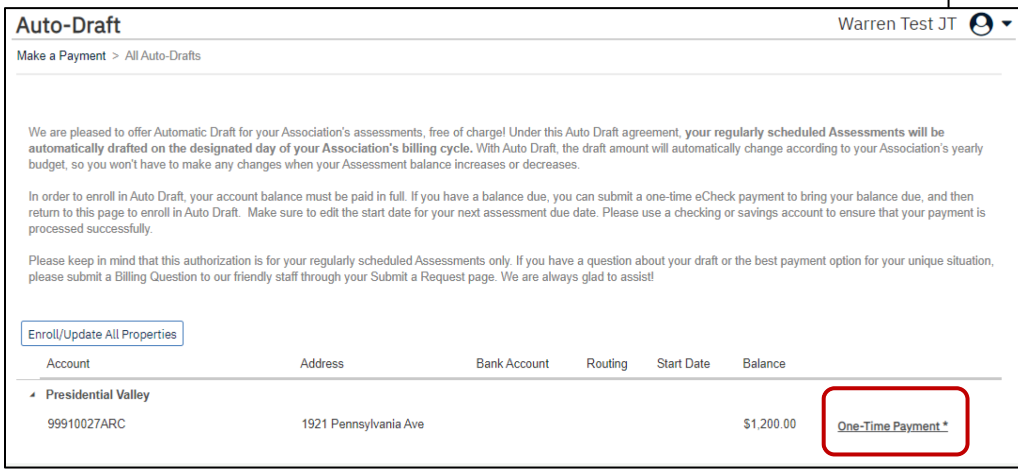


Payments made by e-Check or Credit Card will be processed by a third-party service provider (Paylease), and convenience fees will be incurred. Such fees will be disclosed on the service provider's website once you are redirected there.

Auto-Draft (ACH) Payments

Enrolling in Auto-Draft payments means that your regularly scheduled assessments will be automatically withdrawn from your designated bank account on the same day each billing period, **<u>between the 6th and 10th of the month.</u>** There is no fee for this service. Before an account can be enrolled in Auto-Draft, it must have a zero balance. If there is a balance on the account, and you attempt to enroll it in Auto-Draft, you will be redirected to make a one-time payment to bring the balance to zero.





Clicking the **'One-Time Payment'** link will redirect you to a third-party payment site (Paylease). See 'eCheck and Credit Card Payments' below.

eCheck and Credit Card Payments

eCheck and Credit Card payment options can be accessed by clicking the **Credit Card** button on the **Billing** > **Overview** page. Simply click the **Credit Card** button and you will be redirected to the third-party service provider's page (Paylease). From there, you will be prompted to enter a payment amount, select a payment method, and review the payment details, including any applicable service fees.

If you wish to enroll in Auto-Draft after making a one-time credit card or eCheck payment on the Paylease site, please close that browser window then log back in to the owner portal and select Auto-Draft to complete your enrollment. **<u>DO NOT</u>** set up auto-pay within the Paylease site.

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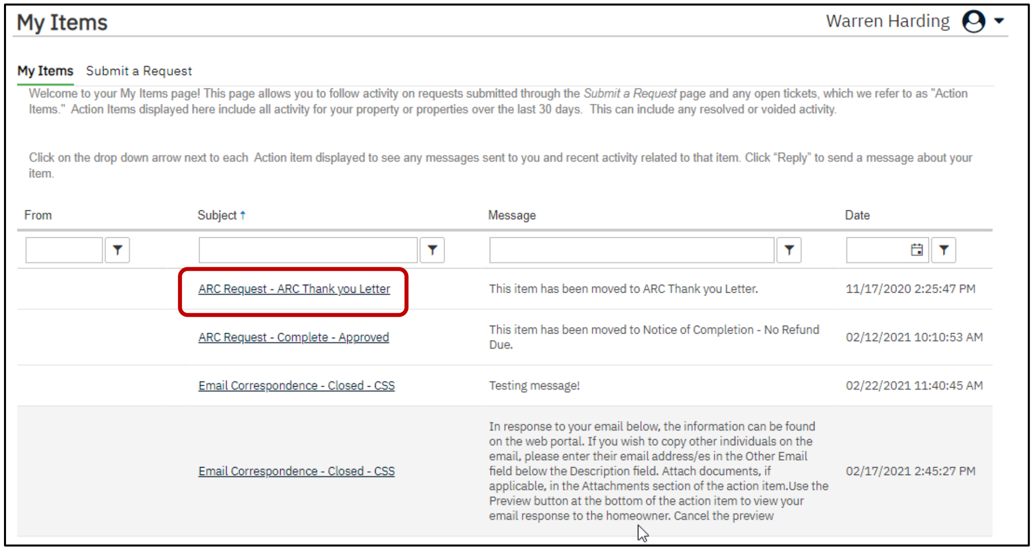


My Items

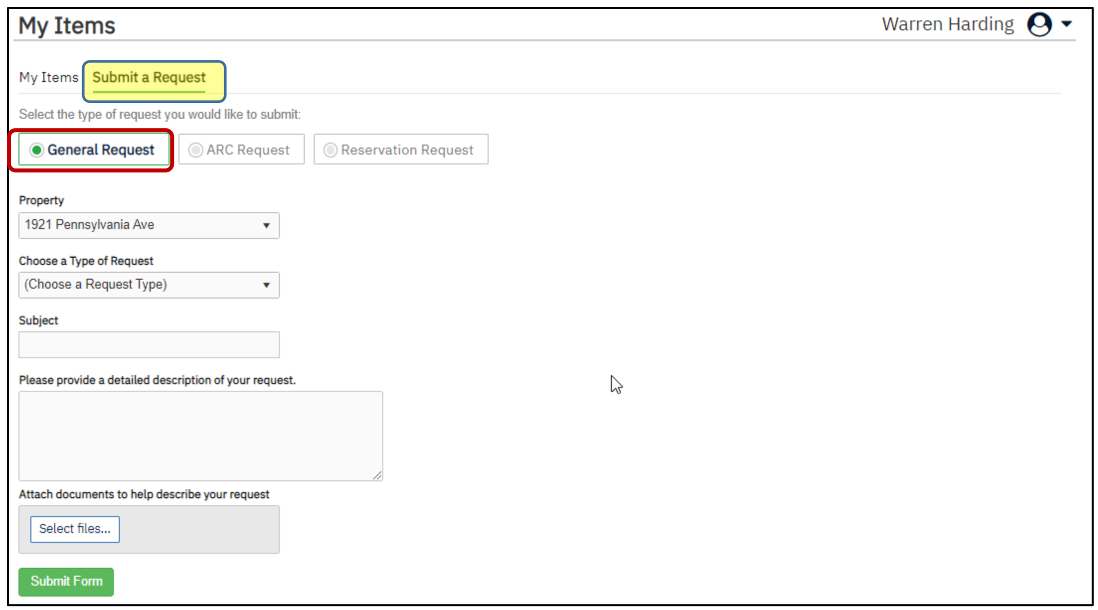
The ‘**My Items’** page lists activities, tasks, and processes related to your property. These items are commonly referred to as ‘action items’. Your list will include all open items, plus closed items for the past 30 days. Click the action item to see the current status of the item, along with communication and historical steps. You also have the ability to send a message to your management team from within an item.

Submit a Request

Within the **My Items** > **Submit a Request** page, you have the ability to submit a variety of general requests to your management team, depending on your region:

- ✓ Access Device Request
- ✓ Billing Question
- ✓ Clubhouse Reservation
- ✓ Fee Waiver Request
- ✓ General Question
- ✓ Lease Request
- ✓ Temporary Parking Permit
- ✓ Vehicle Registration Request
- ✓ Work Order

Simply click the **‘General Request’** button, select the property for which you are submitting the request, then select the type of request from the drop down menu, and complete the remaining fields. You have the option to attach files, if needed. Once you have completed the form, click the **‘Submit Form’** button.

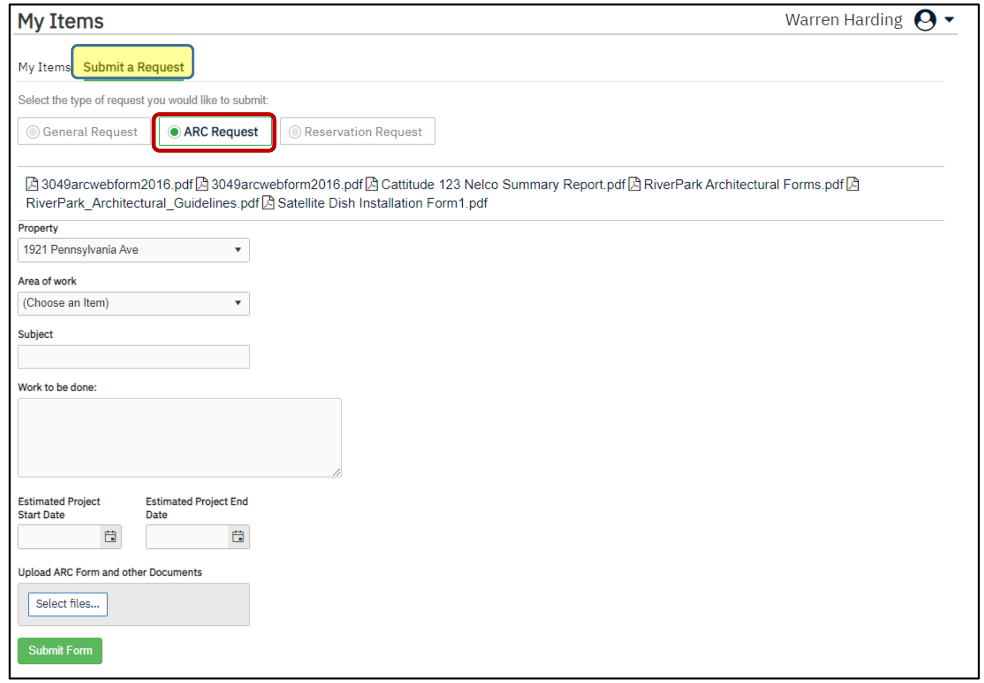


ARC Request

Within the **My Items** > **Submit a Request** page, you also have the ability to initiate an architectural modification (ARC/DRC) request by clicking the **'ARC Request'** button. Depending on your association, there may be forms and documents for you to review, download, and/or print so that you can complete, sign, and upload them with your request.

Select the property for which you are submitting the request, select the type of modification, complete the remaining fields, upload any attachments, and then click **'Submit Form'**. Your request will be sent to the appropriate member of your management team and you will receive a confirmation email that we have received your request.

Your request will now be visible under the '**My Items'** tab and you will be able to view the current status, along with the steps taken and any emails and/or letters generated.

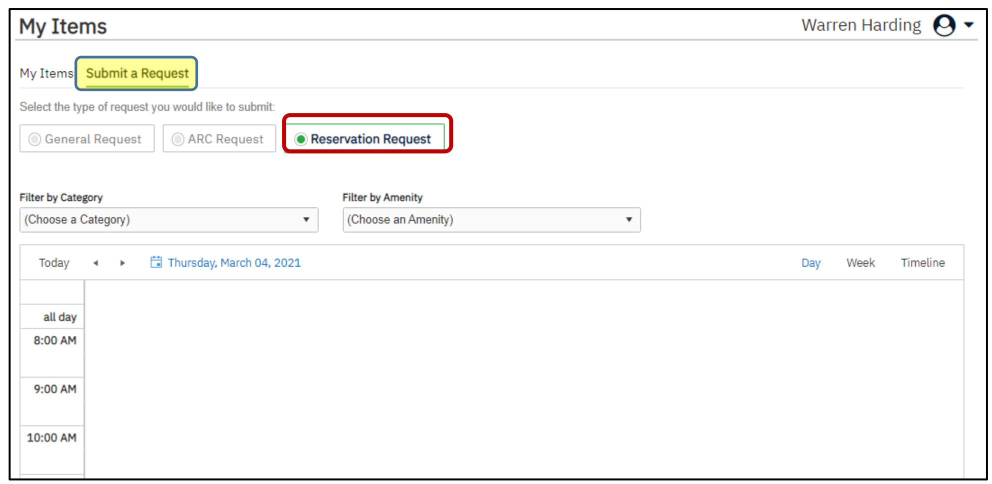


Reservation Request

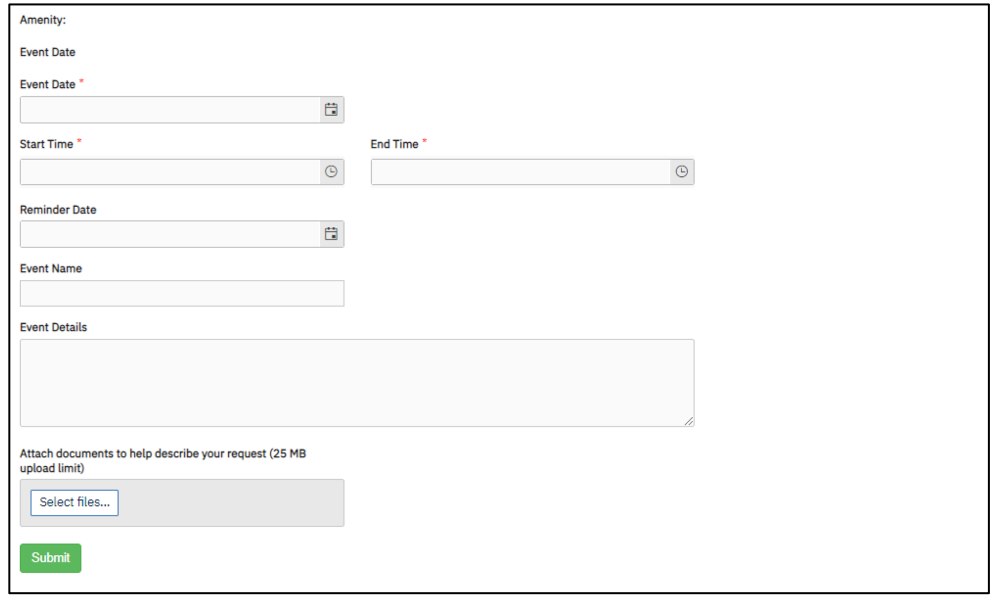
Within the **My Items** > **Submit a Request** page, you will have the ability to view a reservation calendar for the association amenities which are available to rent.

Click the '**Reservation Request'** button, select the category and amenity you wish to rent, and the calendar will display its availability.

NOTE: This feature currently may be disabled due to COVID restrictions in your region. It will be re-enabled as restrictions are lifted in your area.



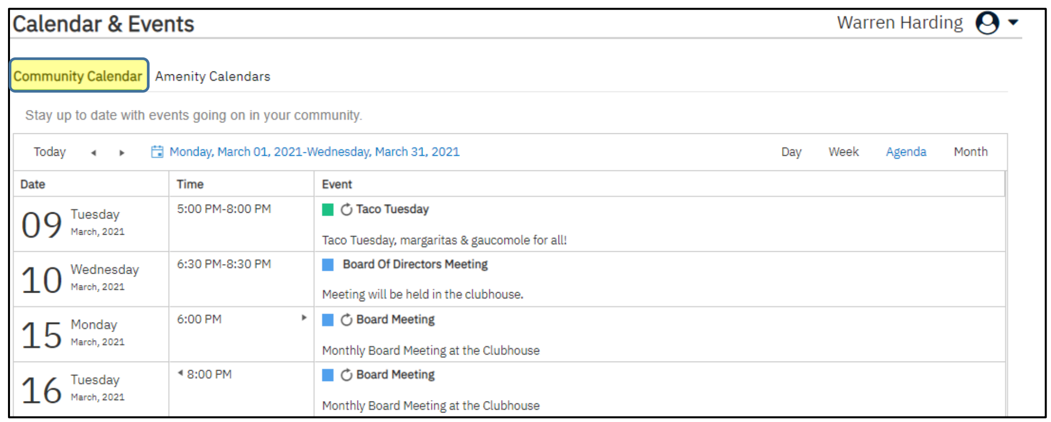
Once you have reviewed the available dates and decided on your preferred event date, complete the required fields and submit your request.



Calendar & Events Page

The **Calendar & Events** page will display community events and meetings. You will have the ability to view the calendar in multiple ways: by day, by week, or by month. You may also view the calendar in an agenda format.

Once enabled, the ‘**Amenity Calendars’** page will allow you to view availability for community amenities which can be rented by owners. See the ‘**Reservation Request’** section for more information.



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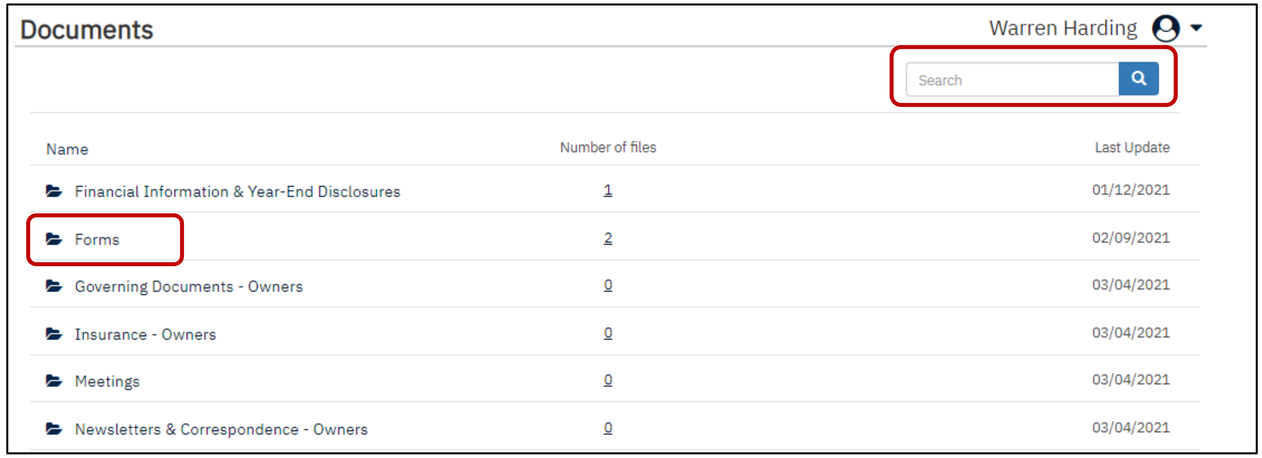
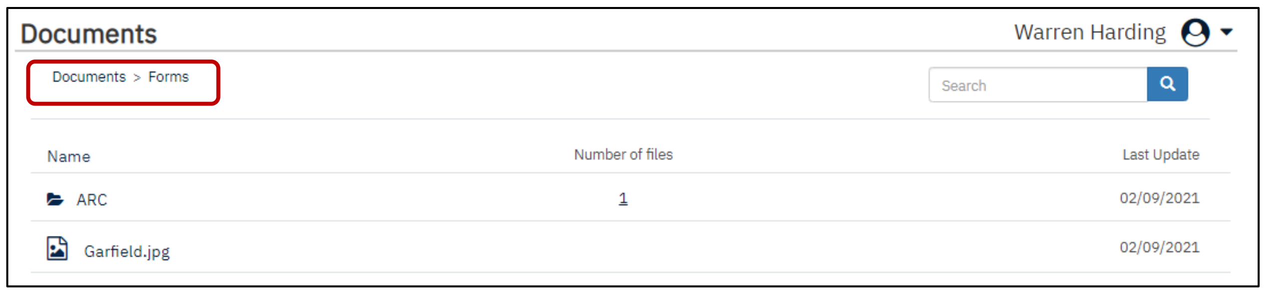
Documents Page

In the '**Documents'** page, you can view association forms and documents, including but not limited to: meeting minutes, newsletters, insurance disclosures, budgets, and financials. Simply click on a folder to open it. You may also enter keywords in the Search field.



These documents are stored within folders, some of which may be nested within other folders. The folder file path will always be displayed along the top of the page for your reference and easy navigation back through the path.



We hope you find the owner portal a powerful yet user-friendly tool for managing your account, at your convenience, 24/7/365. Should you have any questions regarding the owner portal, we invite you to contact your management team.