

Homeowner Portal

Dear Association Member:

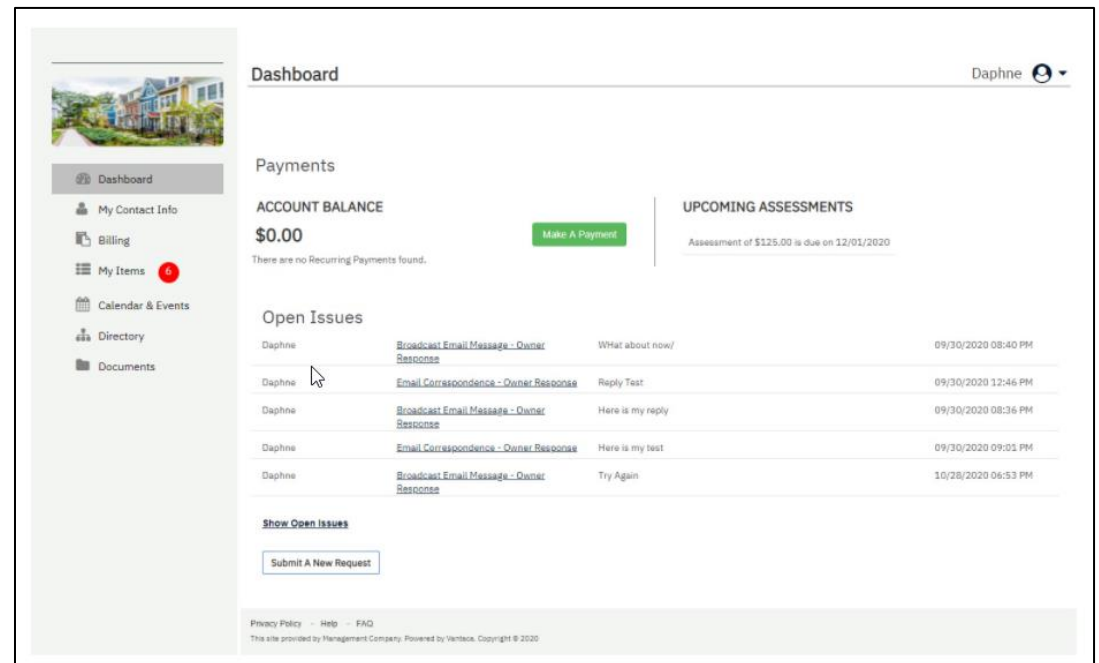
We are excited to announce that the homeowner portal—which allows you to access your account information and communicate with your management team—has been updated with a new look and a few new features. This document will walk you through the updated pages and functionality.

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.



The screenshot shows the Homeowner Portal Dashboard for a user named Daphne. The dashboard includes a navigation menu on the left with options: Dashboard, My Contact Info, Billing, My Items (with a red notification badge), Calendar & Events, Directory, and Documents. The main content area is titled 'Dashboard' and features several sections:

- Payments:** Shows an 'ACCOUNT BALANCE' of '\$0.00' with a 'Make A Payment' button. A note states 'There are no Recurring Payments found.'
- UPCOMING ASSESSMENTS:** Shows an 'Assessment of \$125.00 is due on 12/01/2020'.
- Open Issues:** A table listing recent issues and responses.

From	Subject	Message	Date
Daphne	Broadcast Email Message - Owner Response	What about now?	09/30/2020 08:40 PM
Daphne	Email Correspondence - Owner Response	Reply Test	09/30/2020 12:46 PM
Daphne	Broadcast Email Message - Owner Response	Here is my reply	09/30/2020 08:36 PM
Daphne	Email Correspondence - Owner Response	Here is my test	09/30/2020 09:01 PM
Daphne	Broadcast Email Message - Owner Response	Try Again	10/28/2020 06:53 PM

At the bottom of the Open Issues section, there is a 'Show Open Issues' link and a 'Submit A New Request' button. The footer contains links for 'Privacy Policy', 'Help', and 'FAQ', along with the text 'This site provided by Management Company. Powered by Veritec. Copyright © 2020'.

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.

My Contact Info
Warren Test JT

Contact Info

My Login

To enhance timely and effective communication between the Association and the unit owners, and reduce costs for your community, you have the option to receive some Association correspondence via email in lieu of US Mail. The law requires authorization for this to occur. Please update your selection below if you would like to receive email communications. By selecting 'Email' as your 'General Communication Preference', I (we) hereby authorize the Association and its Agents to notify me (us), as the **owner**, by email for all official Association notifications as permitted and or required by the applicable state statutes in lieu of US Mail. My email address as listed on this webpage is correct.

Please note you may still receive some notifications via US Mail as required by law, or your Association governing documents. The Association is absolved of all liability for the timing and receipt of notification based on the entry of the email address, any returned email(s), any email(s) filtered by your email system into junk, spam, or other folders, or any other delivery issues based on my selection.

General Communication Preference

Email Paper

Billing Communication Preference

Email Paper

Directory Preferences

Hide Name In Directory?

Hide Email In Directory?

Hide Phone In Directory?

Hide Property In Directory?

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
<input type="button" value="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.

Contact Type:

Primary:

Label:

Email:

My Contact Info

Contact Info My Login

Login

Current Password

New Password

Confirm New Password

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.

Billing

Warren Test JT 

Overview Make a Payment

Please note that if your account is in collections/with legal, the transactions below may not reflect all current charges.
 If you have a question about your owner account, please visit the [Submit a Request](#) page and submit a Billing Question.

Check Remittance Address - PO

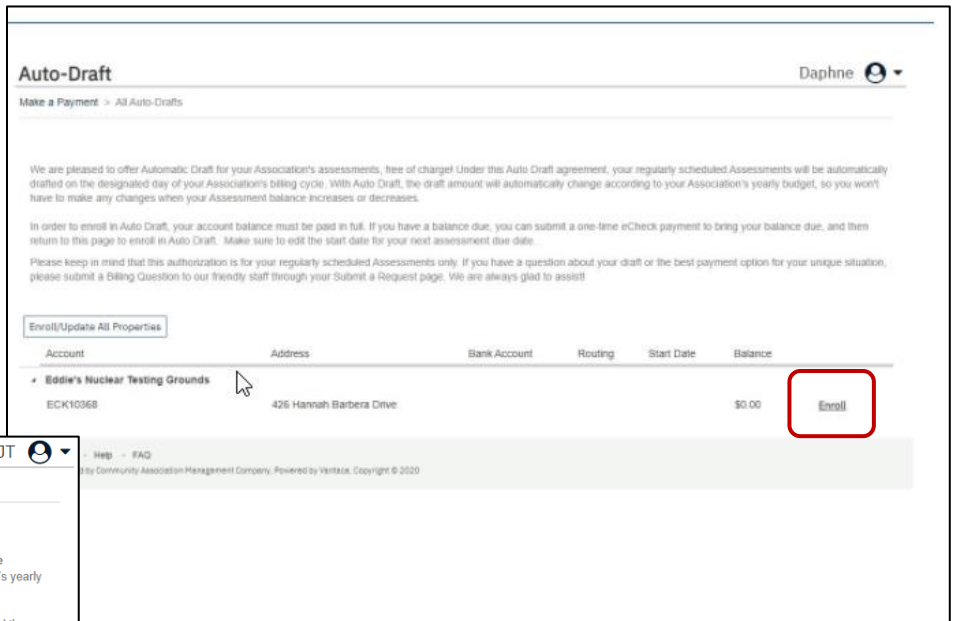
Current Balance **\$132,454.53**

Current Balance	Make this payment via:
\$128,704.53	<input type="button" value="Auto-Draft"/> <input type="button" value="Credit Card"/>
Due on 3/1/2021	

Account #: 99910027
 Association: Presidential Valley
 Address: 1921 Pennsylvania Ave

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, **between the 6th and 10th of the month.** 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.



Auto-Draft Daphne

Make a Payment > All Auto-Drafts

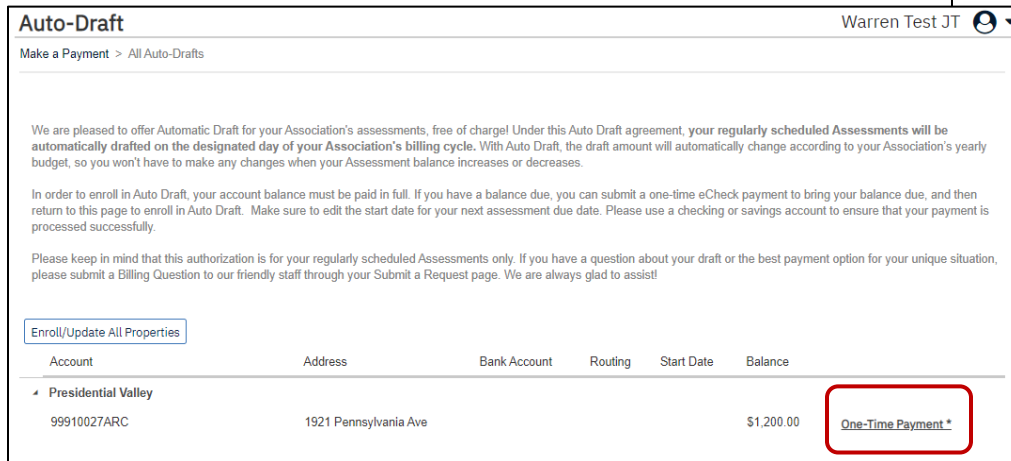
We are pleased to offer Automatic Draft for your Association's assessments, free of charge! Under this Auto Draft agreement, your regularly scheduled Assessments will be automatically drafted on the designated day of your Association's billing cycle. With Auto Draft, the draft amount will automatically change according to your Association's yearly budget, so you won't have to make any changes when your Assessment balance increases or decreases.

In order to enroll in Auto Draft, your account balance must be paid in full. If you have a balance due, you can submit a one-time eCheck payment to bring your balance due, and then return to this page to enroll in Auto Draft. Make sure to edit the start date for your next assessment due date.

Please keep in mind that this authorization is for your regularly scheduled Assessments only. If you have a question about your draft or the best payment option for your unique situation, please submit a Billing Question to our friendly staff through your Submit a Request page. We are always glad to assist!

[Enroll/Update All Properties](#)

Account	Address	Bank Account	Routing	Start Date	Balance	
<ul style="list-style-type: none"> Eddie's Nuclear Testing Grounds <ul style="list-style-type: none"> ECK10368 	426 Hannah Barbera Drive				\$0.00	Enroll



Auto-Draft Warren Test JT

Make a Payment > All Auto-Drafts

We are pleased to offer Automatic Draft for your Association's assessments, free of charge! Under this Auto Draft agreement, your regularly scheduled Assessments will be automatically drafted on the designated day of your Association's billing cycle. With Auto Draft, the draft amount will automatically change according to your Association's yearly budget, so you won't have to make any changes when your Assessment balance increases or decreases.

In order to enroll in Auto Draft, your account balance must be paid in full. If you have a balance due, you can submit a one-time eCheck payment to bring your balance due, and then return to this page to enroll in Auto Draft. Make sure to edit the start date for your next assessment due date. Please use a checking or savings account to ensure that your payment is processed successfully.

Please keep in mind that this authorization is for your regularly scheduled Assessments only. If you have a question about your draft or the best payment option for your unique situation, please submit a Billing Question to our friendly staff through your Submit a Request page. We are always glad to assist!

[Enroll/Update All Properties](#)

Account	Address	Bank Account	Routing	Start Date	Balance	
<ul style="list-style-type: none"> Presidential Valley <ul style="list-style-type: none"> 99910027ARC 	1921 Pennsylvania Ave				\$1,200.00	One-Time Payment *

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. **DO NOT** set up auto-pay within the Paylease site.

My Items Warren Harding

My Items Submit a Request

Welcome to your My Items page! This page allows you to follow activity on requests submitted through the *Submit a Request* page and any open tickets, which we refer to as "Action Items." Action Items displayed here include all activity for your property or properties over the last 30 days. This can include any resolved or voided activity.

Click on the drop down arrow next to each Action item displayed to see any messages sent to you and recent activity related to that item. Click "Reply" to send a message about your item.

From	Subject ↑	Message	Date
	ARC Request - ARC Thank you Letter	This item has been moved to ARC Thank you Letter.	11/17/2020 2:25:47 PM
	ARC Request - Complete - Approved	This item has been moved to Notice of Completion - No Refund Due.	02/12/2021 10:10:53 AM
	Email Correspondence - Closed - CSS	Testing message!	02/22/2021 11:40:45 AM
	Email Correspondence - Closed - CSS	In response to your email below, the information can be found on the web portal. If you wish to copy other individuals on the email, please enter their email address/es in the Other Email field below the Description field. Attach documents, if applicable, in the Attachments section of the action item. Use the Preview button at the bottom of the action item to view your email response to the homeowner. Cancel the preview	02/17/2021 2:45:27 PM

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.

My Items Warren Harding

My Items **Submit a Request**

Select the type of request you would like to submit:

General Request ARC Request Reservation Request

Property
1921 Pennsylvania Ave

Choose a Type of Request
(Choose a Request Type)

Subject

Please provide a detailed description of your request.

Attach documents to help describe your request

Select files...

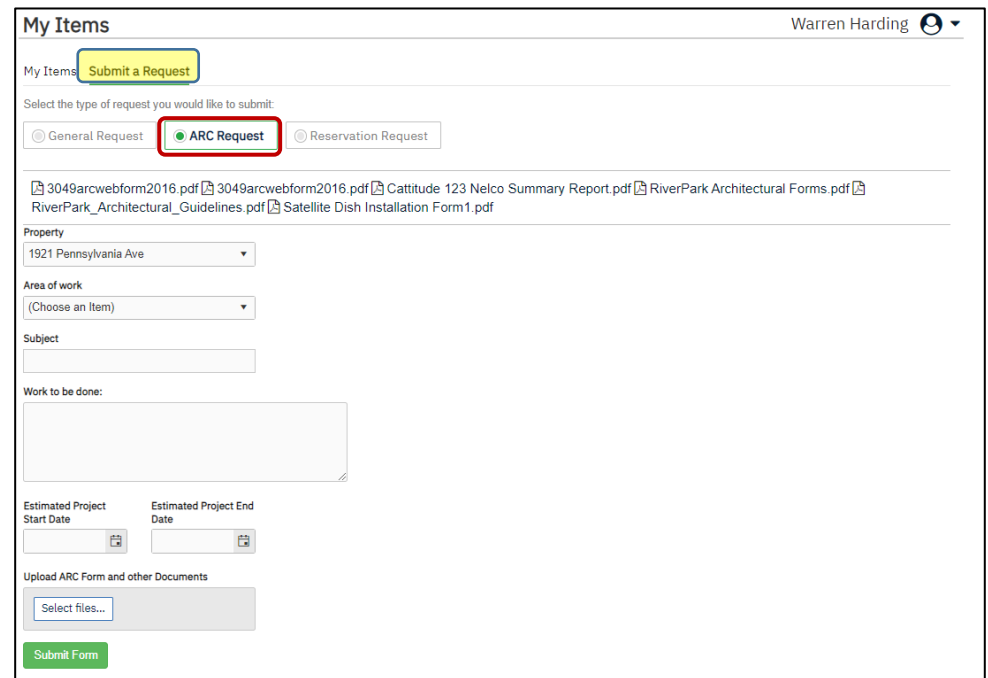
Submit Form

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.



My Items Warren Harding

My Items **Submit a Request**

Select the type of request you would like to submit:

General Request **ARC Request** Reservation Request

[3049arcwebform2016.pdf](#)
[3049arcwebform2016.pdf](#)
[Cattitude 123 Nelco Summary Report.pdf](#)
[RiverPark Architectural Forms.pdf](#)
[RiverPark_Architectural_Guidelines.pdf](#)
[Satellite Dish Installation Form1.pdf](#)

Property
1921 Pennsylvania Ave

Area of work
(Choose an Item)

Subject

Work to be done:

Estimated Project Start Date
Estimated Project End Date

Upload ARC Form and other Documents
Select files...

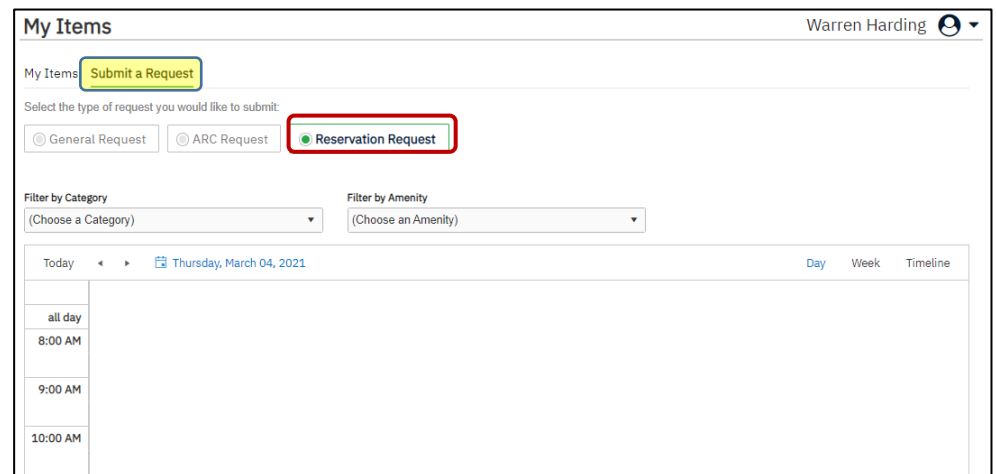
Submit Form

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.



My Items Warren Harding

My Items **Submit a Request**

Select the type of request you would like to submit:

General Request ARC Request **Reservation Request**

Filter by Category
(Choose a Category)

Filter by Amenity
(Choose an Amenity)

Today **Thursday, March 04, 2021** Day Week Timeline

all day	
8:00 AM	
9:00 AM	
10:00 AM	

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

Amenity:

Event Date

Event Date *

Start Time *

End Time *

Reminder Date

Event Name

Event Details

Attach documents to help describe your request (25 MB upload limit)

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.

Calendar & Events Warren Harding

Community Calendar Amenity Calendars

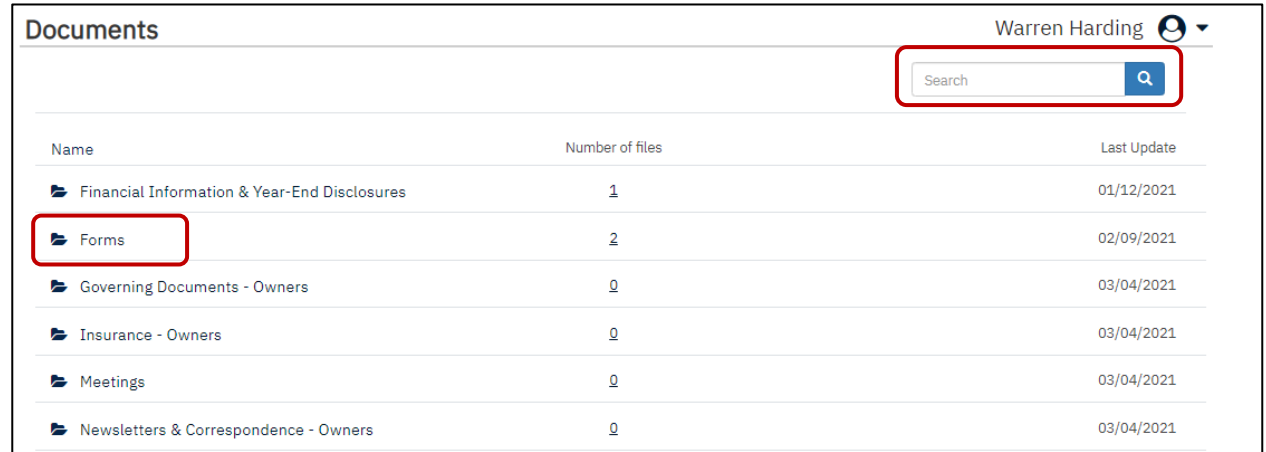
Stay up to date with events going on in your community.

Today Monday, March 01, 2021-Wednesday, March 31, 2021 Day Week Agenda Month

Date	Time	Event
09 Tuesday March, 2021	5:00 PM-8:00 PM	Taco Tuesday Taco Tuesday, margaritas & gaucomole for all!
10 Wednesday March, 2021	6:30 PM-8:30 PM	Board Of Directors Meeting Meeting will be held in the clubhouse.
15 Monday March, 2021	6:00 PM	Board Meeting Monthly Board Meeting at the Clubhouse
16 Tuesday March, 2021	8:00 PM	Board Meeting Monthly Board Meeting at the Clubhouse

Documents Page

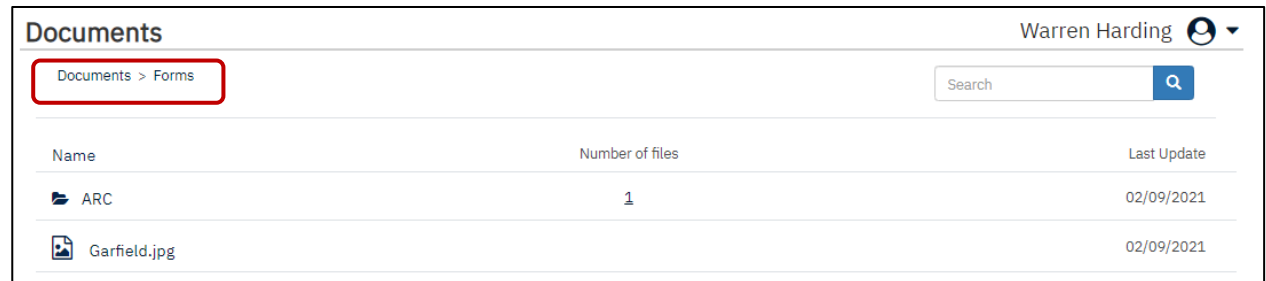
In the **Documents** page, you can view association forms and documents, including but not limited to: meeting minutes, newsletters, insurance disclosures, budgets, and financials. Simply click on a folder to open it. You may also enter keywords in the Search field.



The screenshot shows the 'Documents' page for user Warren Harding. A search bar is highlighted with a red box. Below it is a table with columns for Name, Number of files, and Last Update. The 'Forms' folder is highlighted with a red box.

Name	Number of files	Last Update
Financial Information & Year-End Disclosures	1	01/12/2021
Forms	2	02/09/2021
Governing Documents - Owners	0	03/04/2021
Insurance - Owners	0	03/04/2021
Meetings	0	03/04/2021
Newsletters & Correspondence - Owners	0	03/04/2021

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.



The screenshot shows the 'Documents' page for user Warren Harding, now navigated to the 'Forms' folder. The breadcrumb path 'Documents > Forms' is highlighted with a red box. A search bar is also present. Below it is a table with columns for Name, Number of files, and Last Update. The files listed are 'ARC' and 'Garfield.jpg'.

Name	Number of files	Last Update
ARC	1	02/09/2021
Garfield.jpg		02/09/2021

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.