

PORTALS

Opening Communication

**INTRODUCING
HOMEOWNER PORTALS**

WELCOME TO HOMEOWNER PORTALS!

Homeowner portals are designed to put the power of your association information into the palm of your hand. Your homeowner portal login gives you access to your home's community association account information and allows you to easily pay your assessments online.

Choose Your Device

Whether it's a tablet, phone, phablet, mini, desktop or smart watch, the homeowner portal adapts. So choose your own device. It'll work.



LOGGING IN TO YOUR PORTAL

Opting In

If you have not opted in to receive emails, please check your mail. You should have received a letter from us with instructions on how to proceed.

To insure your privacy, only homeowners whose email address is opted in will be entered into the portal system.

Once your email address has been opted in to the system, register your portal login.

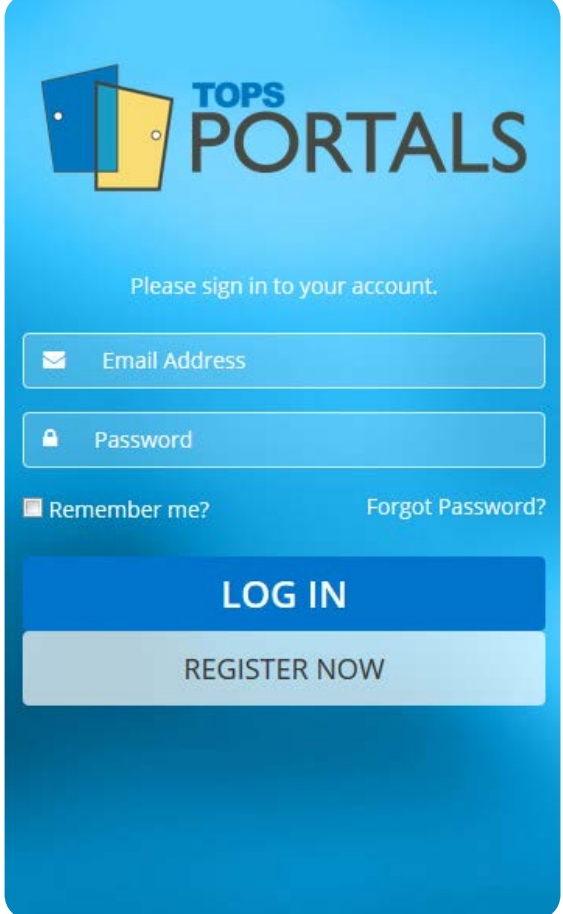
Registration

To get started, go to:

<http://portal.topssoft.com>

Click on the **REGISTER NOW** button to securely claim your account and set your password.

- Your email address is your username.
- Your password must be at least 8 characters



The screenshot shows the TOPS PORTALS login and registration interface. At the top left is the logo, which consists of a blue and yellow graphic of overlapping shapes next to the text 'TOPS PORTALS'. Below the logo, the text 'Please sign in to your account.' is displayed. There are two input fields: 'Email Address' with an envelope icon and 'Password' with a lock icon. Below these fields are two links: 'Remember me?' with a checkbox and 'Forgot Password?'. At the bottom of the form are two buttons: a blue 'LOG IN' button and a grey 'REGISTER NOW' button.

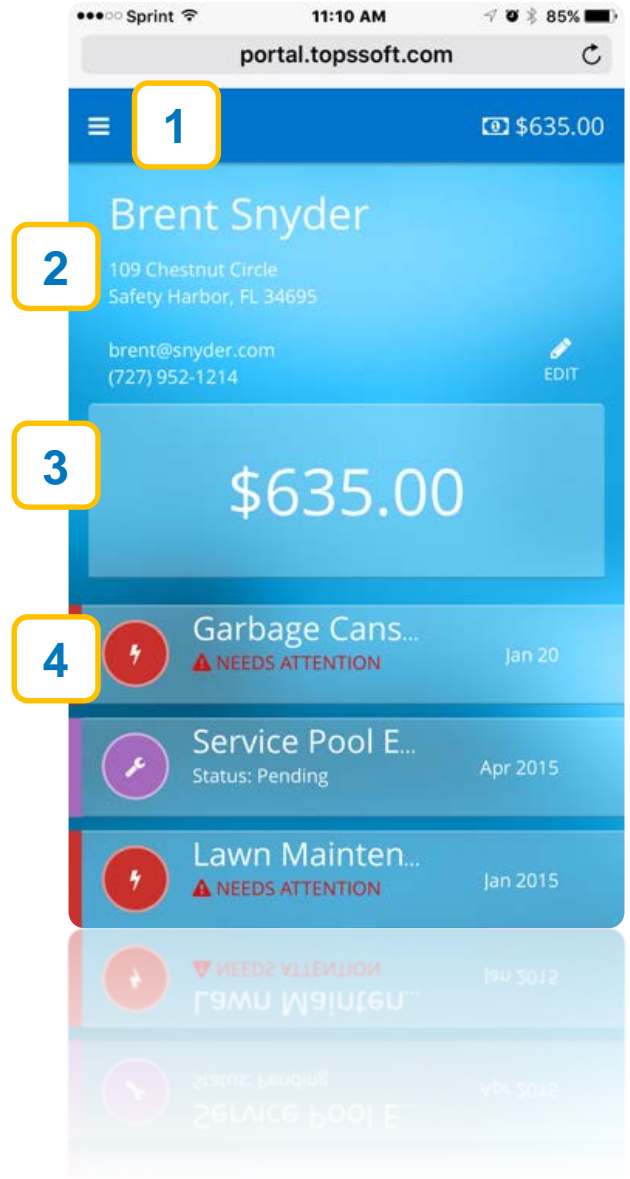
THE PORTALS INTERFACE

Your Homeowner Portal is designed to be simple and easy so you can get in, do what you need to do, and get out:

1. Menu Button (aka 'The Hamburger')
2. Account Information on record
3. Your Current Account Balance
4. Important information that needs your attention.

The Inbox

The first screen you see when you log in is called the Inbox. In the Inbox you can see your important information at a glance, such as current account balance, and open tickets that require your attention.



NAVIGATING VIA THE MENU

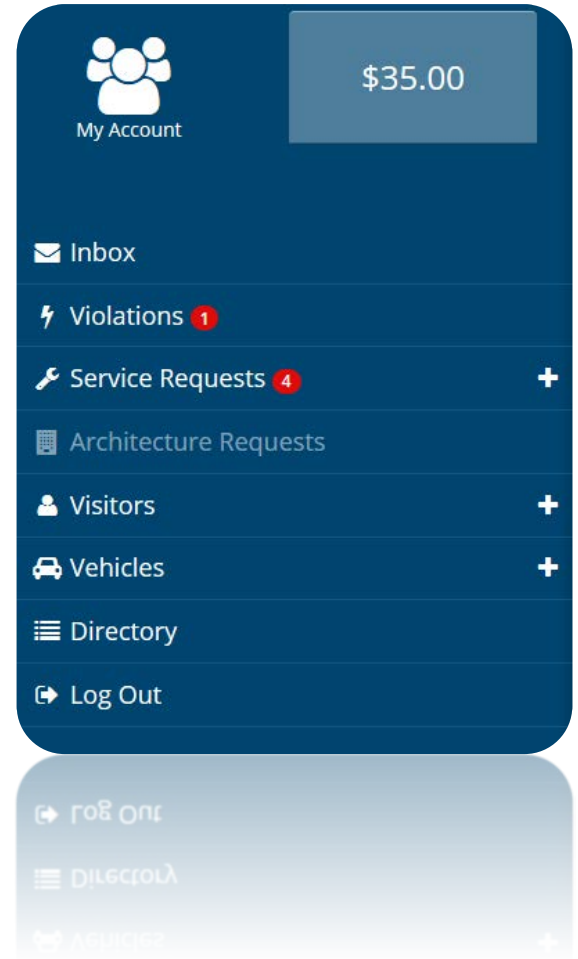
Click the menu hamburger icon in the upper left corner to access the Portals menu. From here, you can navigate anywhere in the app with ease.

Note that the menu will also display the number of open tickets (violations, service requests and architectural requests) that require your attention.

Any section that allows you to add new records or tickets, such as service requests, visitors or vehicles will display a plus sign to the right of the menu item. This allows you to instantly add a record directly from the menu.

Optional Viewing

Please note that all options pictured here may not be available in your community's homeowner portal.



EDITING ACCOUNT INFORMATION

Need to update your account information? Click the Edit Button in the Inbox to manage your personal account information.

Subject to Approval

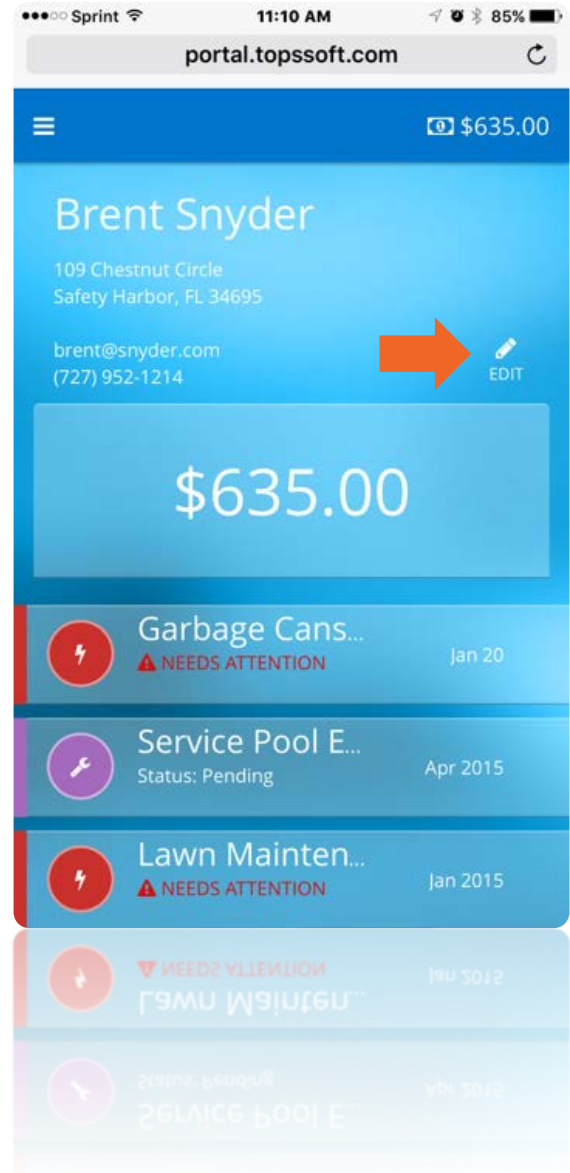
Note that changing this information will also affect the information on record for your community association's official account. For this reason, certain information may be restricted from editing, such as:

- **Name** (the legal name on your property)
- **Address** (the address of the home in the community)
- All fields are subject to be activated or deactivated for updating by the community manager. Changes may also be subject to approval prior to being posted.

To update any of these restricted fields, please contact your manager to request a change.

Updating Your Email

Need to change your primary email address? Your account is your email address, so please contact your manager to request a change.



EDITING ACCOUNT INFORMATION

The screenshot displays the 'My Account' portal interface. At the top right, there is a balance indicator of '\$35.00'. The main content area is divided into several sections:

- Emails:** Shows the 'Account Email Address' as kevine@topsofsoft.com. Below it, two additional email addresses are listed: bsnyder@thismail.com (with 'Primary' and 'Email Notices' buttons) and brent@workemail.com (with 'Primary' and 'Email Notices' buttons). A 'Save Email Updates' button is at the bottom of this section.
- Phones:** Contains input fields for Home (727-952-8530), Work (727-876-1231), Alternate (727-833-8483), and Fax (987-234-1231).
- Addresses:** Includes a 'Property' address (109 Chestnut Circle, Safety Harbor, FL 34695) and two 'Alt. Address' sections. 'Alt. Address 1' has fields for street (1234 Main Street), unit (#236), city (Tampa), and state (FL). 'Alt. Address 2' has fields for PO Box (PO Box 1111), city (Tampa), state (FL), and address line 2.
- Vehicles:** A section with an 'Add' button.
- Visitors:** A section with an 'Add' button.
- Change Password:** A section at the bottom with an 'Edit' button.

Managing Emails

To manage emails from the portal, click the Edit button on the emails section. You may add an unlimited number of email addresses in addition to your account email. Click *Primary* or *Email Notices* to define how you receive communications from your community.

Managing Phones & Addresses

To manage phone numbers and addresses, click the Edit button on the appropriate section. Enter your updated information. Your new information will be reflected in your official community association records within 24 hours.

Change Your Password

To change your password, click the Edit button on the Change password section at the very bottom of the screen.

FINANCIAL MANAGEMENT

Brent Snyder
109 Chestnut Circle
Safety Harbor, FL 34695
krisb@topssoft.com
727-555-6488

\$35.00
PAY NOW

Balance Details

Charge Detail	Amount
Fees	\$35.00

Account History

Date	Description	Amount
3/1/15	APPLY CHARGES	\$35.00
2/15/15	Cash Receipts	(\$35.00)
2/1/15	APPLY CHARGES	\$35.00
1/15/15	Cash Receipts	(\$35.00)
1/1/15	APPLY CHARGES	\$35.00

Click on the account balance button at the top of the Inbox to access your financial account details. Homeowner Portals allows you to access several financial functions for your account, including:

- Check current balance
- See Balance Breakdown
- View Account History
- Pay assessments online

With the exception of the Pay Now button, all of the above information is read only, and may not be edited.

Notes:

- Your account balance is guaranteed to be up to date within 24 hours of changes being made.
- The Pay Now button may be disabled if your community is not set up to accept payments at this time.

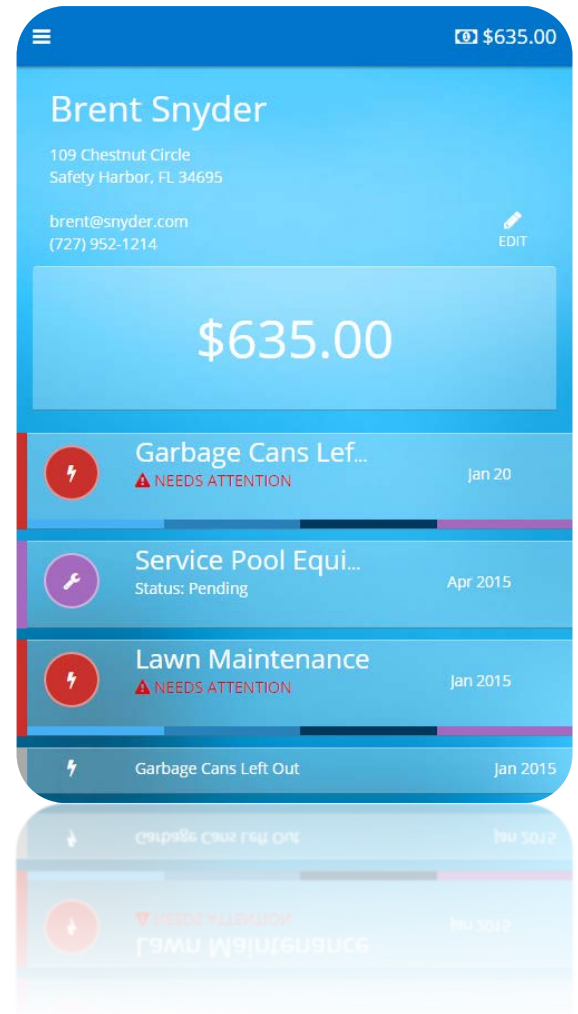
TICKETS IN YOUR INBOX

The inbox is designed to surface important information that requires your attention to the top of the list. Whether it is a new ticket, a communication from your manager, or an imminent or pending fine, the Inbox will bring these issues to your attention.

Click on any item to expand the row and view additional information.

Color Bars:

- Items with a **RED** bar to the left of the record are open violations. Note the multicolored bar at the bottom of the violation – this indicates which phase the violation action is on (courtesy notice, warning, fine, legal action, etc.)
- An **ORANGE** bar to the left indicates an open architectural request. The color bar beneath the record indicates which phase your request is on (pending, changes needed, approved, denied)
- Items with a **PURPLE** bar are open service requests.
- Items with **GRAY** bars indicate informational items and closed tickets that do not require your immediate attention.
- Items with a **WHITE** bar to the left indicate a letter that was sent (either via email or US mail). These items are courtesy notices only and may not be expanded.



TICKET DETAILS

The screenshot shows a ticket details page for 'Lawn Maintenance'. At the top, there are two ticket rows: 'Roof Leaking Badly' (Status: Pending, Sep 11) and 'Lawn Maintenance' (NEEDS ATTENTION, Jan 20). Below these is a timeline with three stages: 'PREVIOUS First Notification Jan 20, 2015', 'CURRENT Second Notification Feb 4, 2015', and 'NEXT Third Notification with \$100 Fine Mar 6, 2015 - \$100.00 Fine'. A photo of overgrown grass is shown on the left. To the right is a 'Summary Description' box containing the text 'Lawn is overgrown'. Below the photo and summary is a 'Notes' section with two entries: 'Last Week I have resolved this issue.' and 'Last Week I have a question. Please EMAIL me.'

You can view the details on any ticket by clicking the ticket row. This will expand the record to show additional information for that record.

Communication:

You may add a note up to 200 characters in length to any ticket by entering it into the note field at the bottom of the record.

OR you can click the down arrow on the right to select quick message text.

In this way, you can communicate with your Community Association Manager, who will receive notification via email whenever you send a note.

This screenshot shows the note input field and dropdown menu. The input field contains the text 'i.e. Please call me.' and a character count of '200'. A dropdown menu is open, showing three options: 'I have resolved this issue.', 'I have a question. Please CALL me.', and 'I have a question. Please EMAIL me.'. Below the dropdown is a button with a plus sign. The background shows a list of tickets, including 'Large Branch in Road' and 'Dec 2015'.

CREATING A SERVICE REQUEST

If your community allows, you may submit a service request through the Homeowner Portal.

To create a service request, click the plus sign on the main menu to the right of the Service Requests menu item.

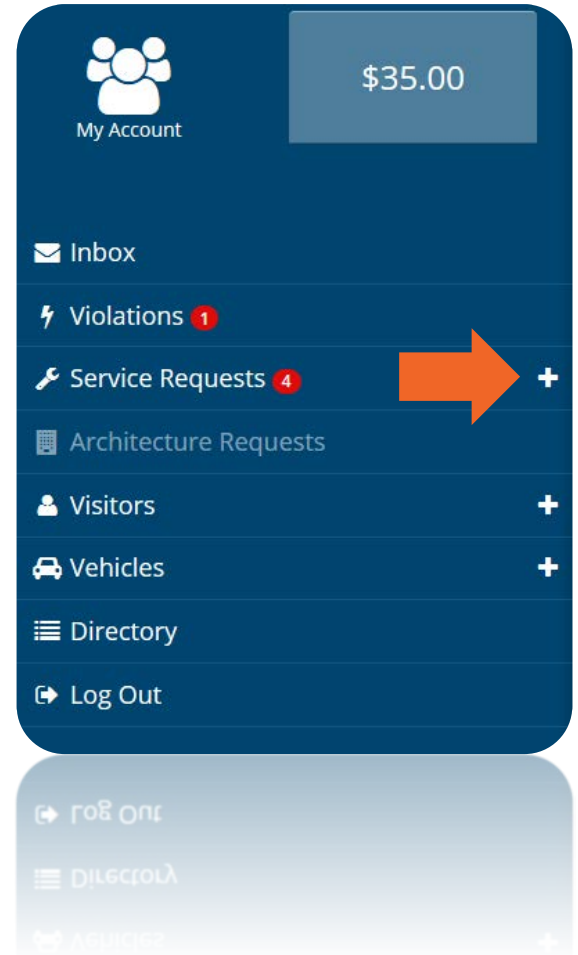
Service requests should be reserved for maintenance work that needs to be done in community common areas or to bring maintenance issues to the attention of the manager. Examples of appropriate service requests include:

- Flickering or burnt-out street lights
- Potholes or maintenance needs on community streets
- Lighting outages in common areas
- Maintenance needs in common areas

Service requests should NOT be used to report the activities of your neighbors or to lodge complaints.

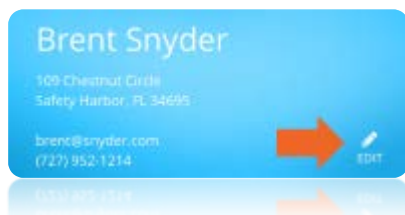
Service Requests are reviewed by the community association manager. Items approved for work will be upgraded to Work Orders.

Please be advised that service requests submitted that affect your personal property may be denied, or work order costs may be charged back to your account.



VISITOR AND VEHICLE PASSES (OPTIONAL)

You can find Visitors and Vehicle information for your home by clicking the Edit button beside your contact information on the inbox screen, or from the main menu.



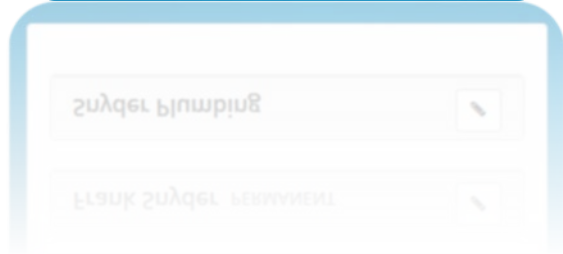
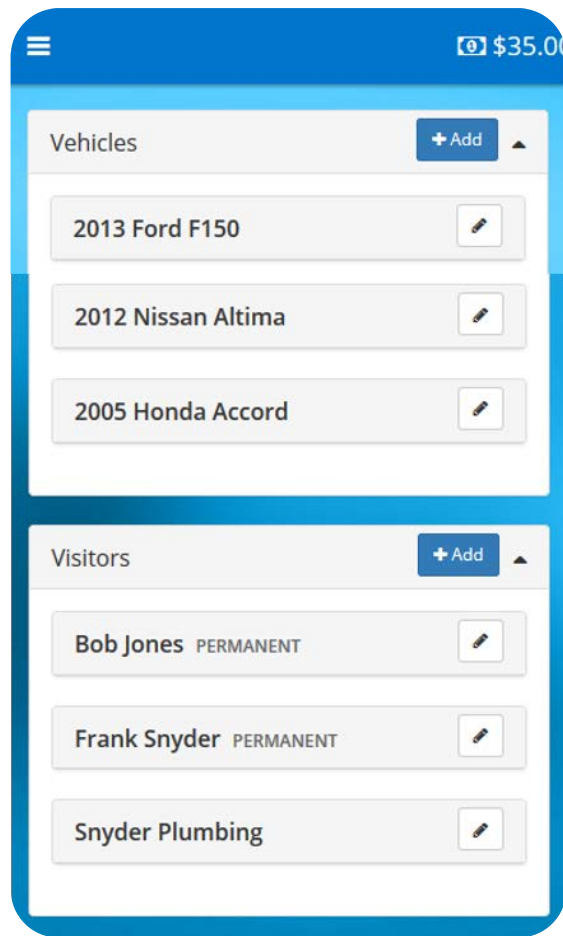
Vehicles

The vehicles portion of the app refers to vehicles belonging to you and members of your household. In community associations where parking is restricted by pass, this section will allow you to manage the list of currently active vehicles.

Visitors

If you live in a community with gated or restricted access, the visitors section will allow you to add temporary and permanent visitors to your account.

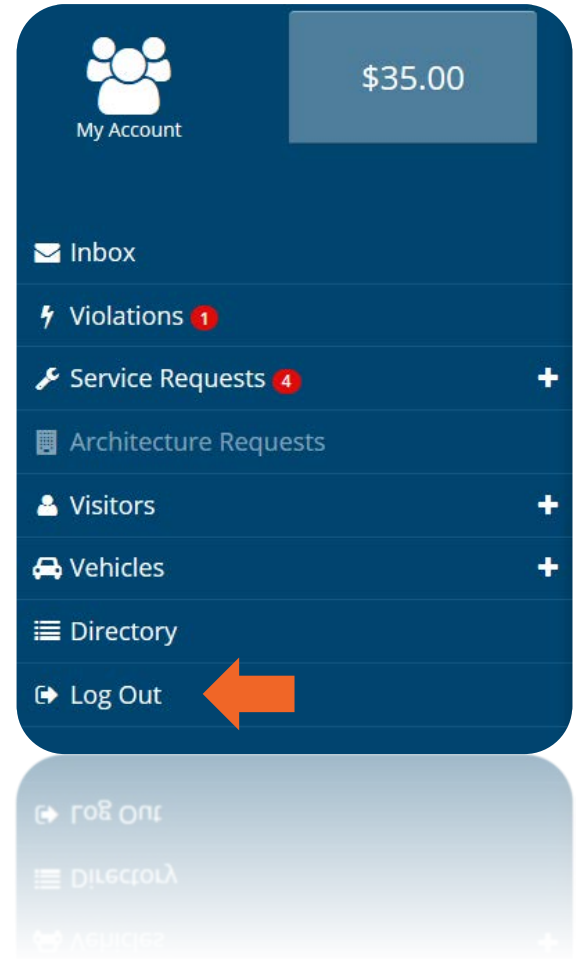
NOTE: Depending on the restrictions set forth by your board and/or the security team, you may need to follow your community's existing procedures in addition to adding visitors to this portal.



LOGGING OUT

You will be automatically logged out of the portal after 15 minutes of inactivity.

However, if you need to log out manually, you may do so by clicking the Menu hamburger, and selecting the Log Out option.



THANK YOU & SUPPORT:

Thank you for reading this introductory guide to Homeowner Portals. If you have questions or need assistance with any of the features you've seen here, please contact your community association manager.