

Owner Guide to Caliber Portal

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Introduction

Welcome to Caliber Portal! This document will guide HOA property owners on how to use the features and functions of the Caliber Portal website for your Home Owners Association (HOA). Your Property Management Company has implemented Caliber Software to support your HOA property management requirements. Caliber is an industry leading software product that provides integrated property management functionality to Property Management providers. The Caliber Portal website enables homeowners and board members to access information in Caliber in REAL time.

HOA property owners can view their accounting and balance due information, update their profiles, view a directory of other owners and access important documents from their HOA. Documents available in the portal can include Declaration of Covenants, By-Laws, Articles of Incorporation, Policies, Rules & Regulations, Monthly & Annual Accounting reports, Meeting Minutes and more.

In addition to these features, Caliber Portal will have future capabilities that may include compliance, maintenance requests and architecture control requests, depending on what your HOA Board chooses to enable.

Home

After you have registered (please see the Caliber Portal Registration Guide to learn more about registering for a login to access Caliber Portal), enter your username and password to log in. The first time you log in, you will see two red info boxes on your screen.

1. Hover cursor over account name to view Account Number and Address.
2. Click an item to assign as one of your two Quickview options.
 - If you would like **Profile** information to show in your top Quickview, click **Profile**.
 - If you would like to have **Accounting** show at the bottom Quickview, simply click **Accounting**.
 - If you would like to change these at any time, click the X in the upper right corner of the Quickview and make the new selections.
3. To the Left of your **Home** screen you will see your **Primary Account-Owner Ledger** displaying your balance. Clicking the **Pay Now** button will allow you to make a one-time payment or a recurring automatic payment using a credit card or your bank account.
**** Please Note – there is a transaction fee for payments made using Pay Now. The fee will be presented to you and you will be asked to confirm you agree to the fee before the payment is confirmed and saved. Please contact Maximum Property Management if you have any questions about using the Pay Now feature. ****

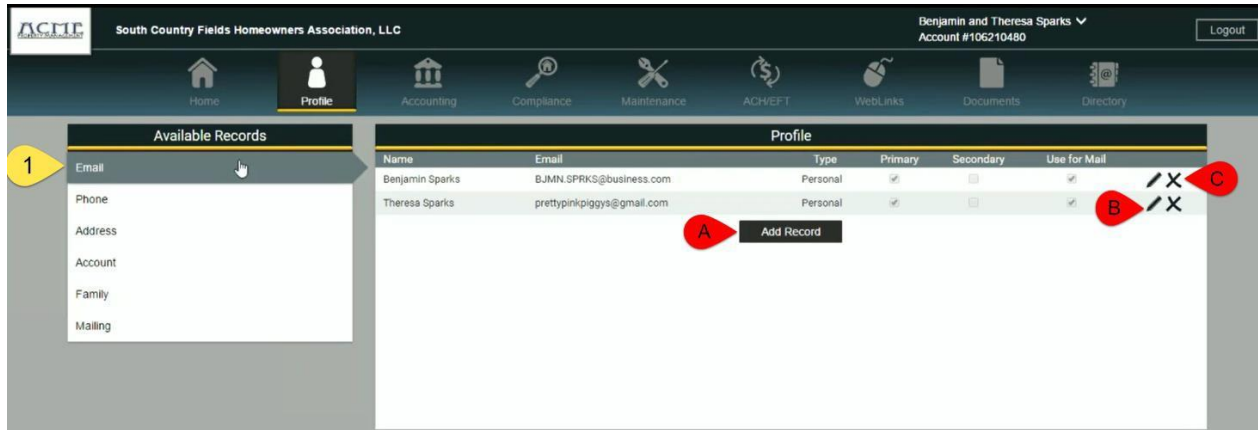
The screenshot displays the Caliber Portal Home page. At the top, the header includes the Maximum logo, 'Caliber Test Community', an account number, and a dropdown menu with 'owner' and 'board' options, along with a 'Logout' button. Below the header is a navigation bar with icons for Home, Profile, Accounting, WebLinks, Documents, Directory, and Notifications. The main content area is divided into two sections. The left section, labeled 'Primary Account - Primary', shows a balance of \$230.00 and a 'Pay Now' button. The right section contains two identical 'Select Your Preferred Owner QuickView' panels. Each panel has a red '2' next to it and features a grid of icons for Profile, Accounting, Web Links, Documents, and Directory, with a 'Notifications' icon below. Red callout boxes provide instructions: 'Hover on name to view account address.' and 'Click to change between owner and board views.'

Profile

Within your Profile, you can view or update any profile or contact information.

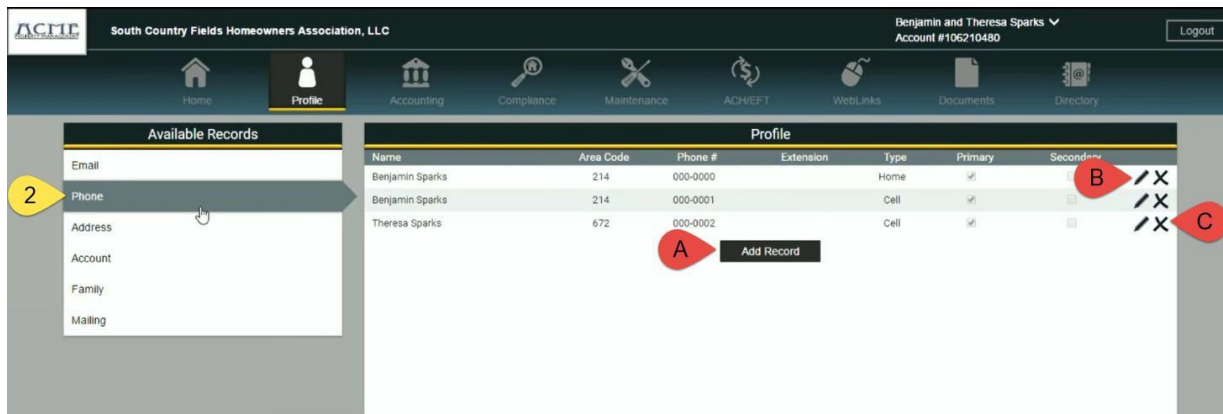
1. Email

- A. Add Record
- B. Edit Record
- C. Delete Record



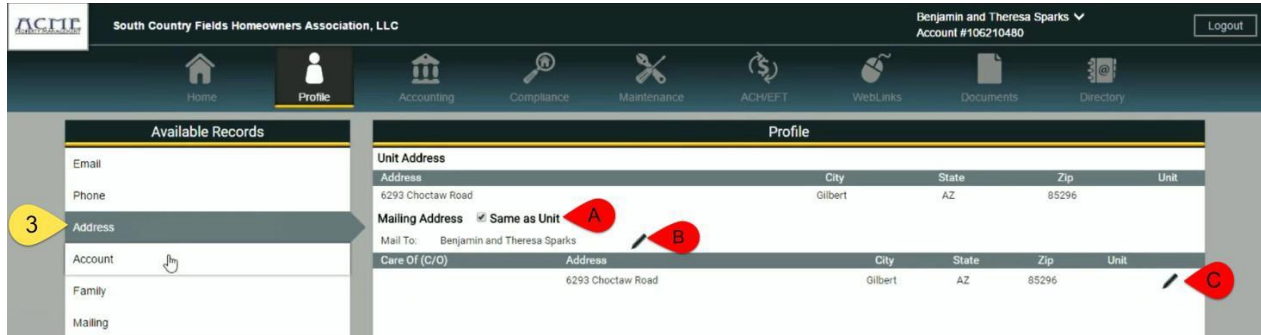
2. Phone

- A. Add Record
- B. Edit Record
- C. Delete Record



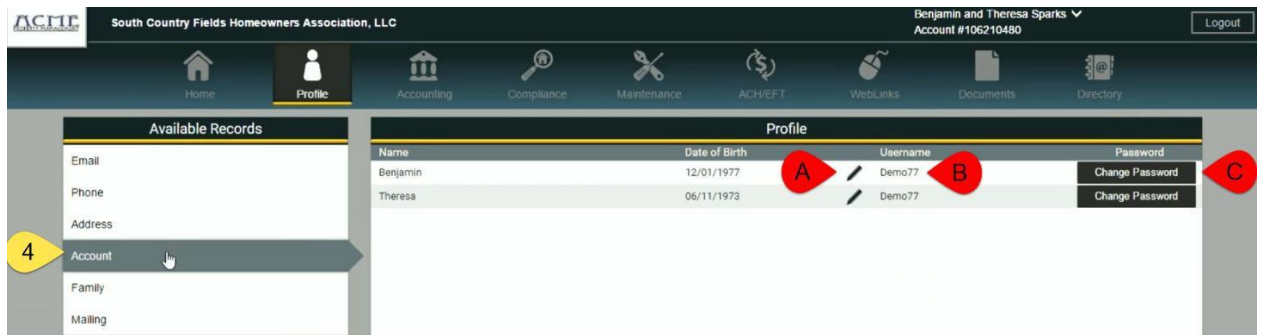
3. Address

- A. Make Mailing Address the same as the Unit Address
- B. Edit Mail To
- C. Edit Mailing Address



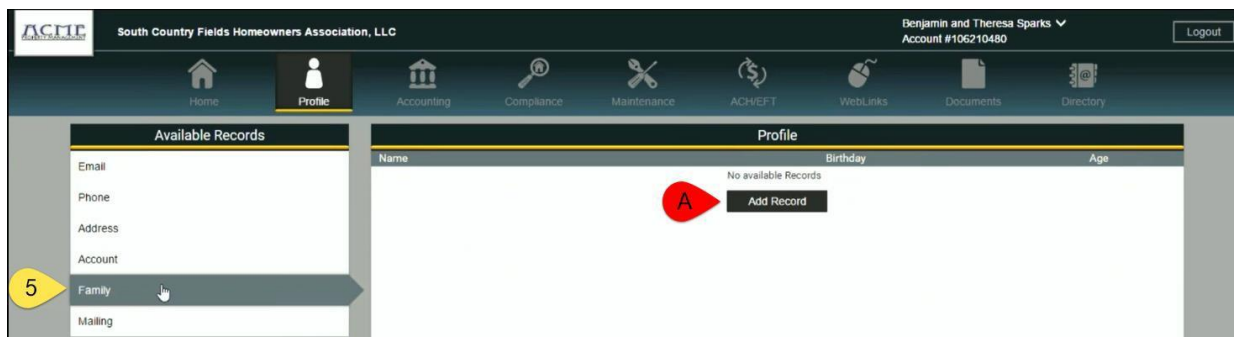
4. Account

- A. Edit Date of Birth (this information will only be present if your Management Company has enabled it in Caliber Software)
- B. View Portal Username
- C. Change Portal Password



5. Family

- A. Add family member record



Owner Guide to Caliber Portal

6. **Mailing:** Allows you to decide how you would like to receive your Correspondence from your Management Company. Your options are Mail, Email, or you can choose both. Please note that Caliber Portal does not allow Owners to choose to receive your monthly statement via email. If you would like to receive your billing statement through email please visit <https://maximummgt.opt-e-mail.com/signup>.

****Caliber does not offer owners to receive Coupons via EMAIL****

A. You will click the Edit icon prior to making adjustments. Then you make your selections and SAVE.

The screenshot shows the Caliber Portal interface for 'South Country Fields Homeowners Association, LLC'. The user is logged in as 'Benjamin and Theresa Sparks' with account number '106210480'. The 'Profile' tab is selected in the navigation menu. On the left, the 'Available Records' sidebar has 'Mailing' selected, indicated by a yellow circle with the number '6'. The main content area displays a table for 'Profile' with columns for 'Correspondance', 'Mail', 'Email', and an edit icon. A red circle with the letter 'A' highlights the edit icon for 'Architectural Letters'.

Correspondance	Mail	Email	
Architectural Letters	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Compliance Letters	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Coupons	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Delinquency Letters	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Statements	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Miscellaneous Letters (default setting)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Sewer Clean Out	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Accounting

In Accounting, you can view account history and pay balance.

1. Pay balance with a credit card or bank account. You will be charged a transaction fee for this Pay Now service. The system will present the fee and ask if you still want to continue.
2. Adjust how many items are shown per page.
3. Print your Account History.

The screenshot displays the Accounting section of the Caliber Portal. At the top, the user is identified as Benjamin and Theresa Sparks with account #106210480. The main navigation bar includes Home, Profile, Accounting (selected), Compliance, Maintenance, ACH/EFT, Web Links, Documents, and Directory. The Accounting section is divided into two main areas: Accounts and Balances, and Account History.

Accounts and Balances: Shows an Owner Ledger with a balance of \$500.00. A 'Pay' button is visible. A callout '1' points to the 'Pay' button. Below it, a dropdown menu shows 'Show 10 items per page' and a 'Print' button. Callout '2' points to the dropdown, and callout '3' points to the 'Print' button.

Account History: A table listing transactions with columns for Date, Description, Amount, and Balance.

Date	Description	Amount	Balance
12/01/2016	December 2016 - Assessment	\$500.00	\$500.00
11/05/2016	Payment of Dues	(\$500.00)	\$0.00
11/01/2016	November 2016 - Assessment	\$500.00	\$500.00
10/01/2016	October 2016 - Assessment	\$500.00	\$0.00
09/29/2016	Payment of Dues	(\$500.00)	(\$500.00)
09/05/2016	Payment	(\$500.00)	\$0.00
09/01/2016	September 2016 - Assessment	\$500.00	\$500.00
08/01/2016	Payment	(\$500.00)	\$0.00
08/01/2016	August 2016 - Assessment	\$500.00	\$500.00
07/01/2016	Payment	(\$500.00)	\$0.00

Web Links

Within Web Links, you will be able to view any Links or Emails your Management Company has setup to be available to you.

1. **Link Tree:** Your Available Links will be categorized in Folders.
2. Select Folder.
 - A. Clicking Link will direct you to Website.

South Country Fields Homeowners Association, LLC

Benjamin and Theresa Sparks
Account #106210480

Home Profile Accounting Compliance Maintenance ACH/EFT **WebLinks** Documents Directory

1 Link Tree

- Partners
- Vendors
- 2** Utilities

Description	Link	Date Uploaded
Power	http://www.power.net	11/29/2016
Gas	http://www.gas.net	11/29/2016
Water	http://www.water.gov	11/29/2016

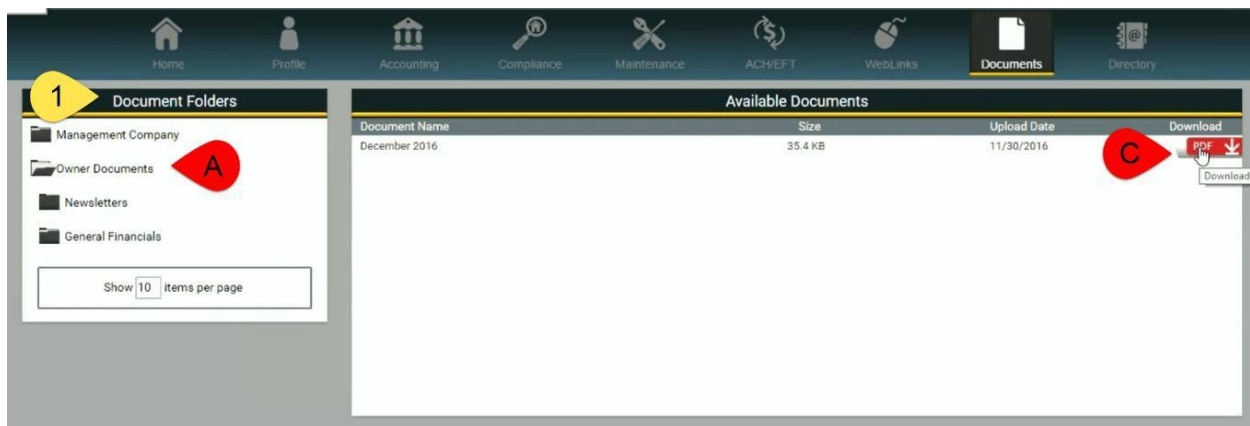
A

Documents

Within Documents, you will be able to view any Documents your Management Company and Board has setup to be available to you. Typically, you will see governing documents (covenants, bylaws, articles of incorporations), monthly accounting, budgets, reserve information, forms, newsletters, meeting minutes and other HOA information needed by Owners in the Documents Folders. What is placed on the portal for you to view will be determined by your Board and the Management Company.

1. Document Folders

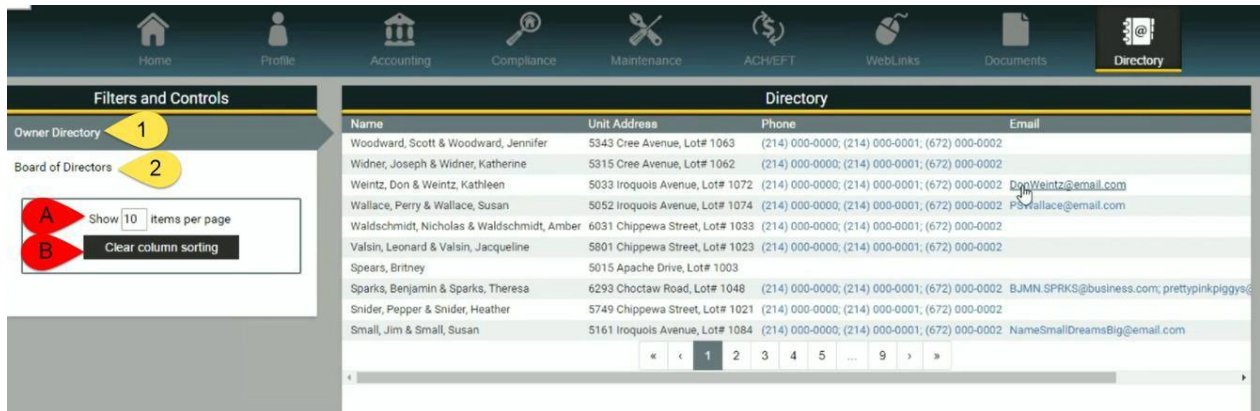
- A. Select Folder
- B. Download Available Document



Directory

The Directory is a tool utilized to view fellow Owners or Board of Directors Contact Information. Filters and Controls:

1. **Owner Directory**
2. **Board of Directors Directory**
 - A. Adjust how many items are displayed per page.
 - B. Clear column sorting



As an Owner, you can set the contact information you want your fellow Owners in your HOA to be able to see in the Directory. By selecting Profile and Directory Settings you will see the selection screen. Here you can choose to display your email, mailing address and phone number to other Owners when they login to the Portal and view the Directory. If the button is checked Yes, they will see that field in the Directory. If No is selected they will not see that information in the Directory. This is often referred to as Opting In or Opting Out of sharing your contact information. By default your Name and Address will always display because this is public information in the State of Colorado.

