



Owner Guide to Caliber Portal

(Revised: May-17)

This is a copyrighted and confidential document intended for users of properly licensed Caliber software. Any other use or reproduction of this document in either hard copy or digital form is prohibited unless authorized, in writing, by Reef Point Technology.

Copyright © 2016 – Caliber Software



Introduction

This document will provide Homeowner functions only. A separate document will provide details for Board Members.

****Please keep in mind these features are available at your Management Company's discretion.***

Home

After you have registered, enter your username and password to log in. The first time you log in, you will see two red info boxes on your screen.

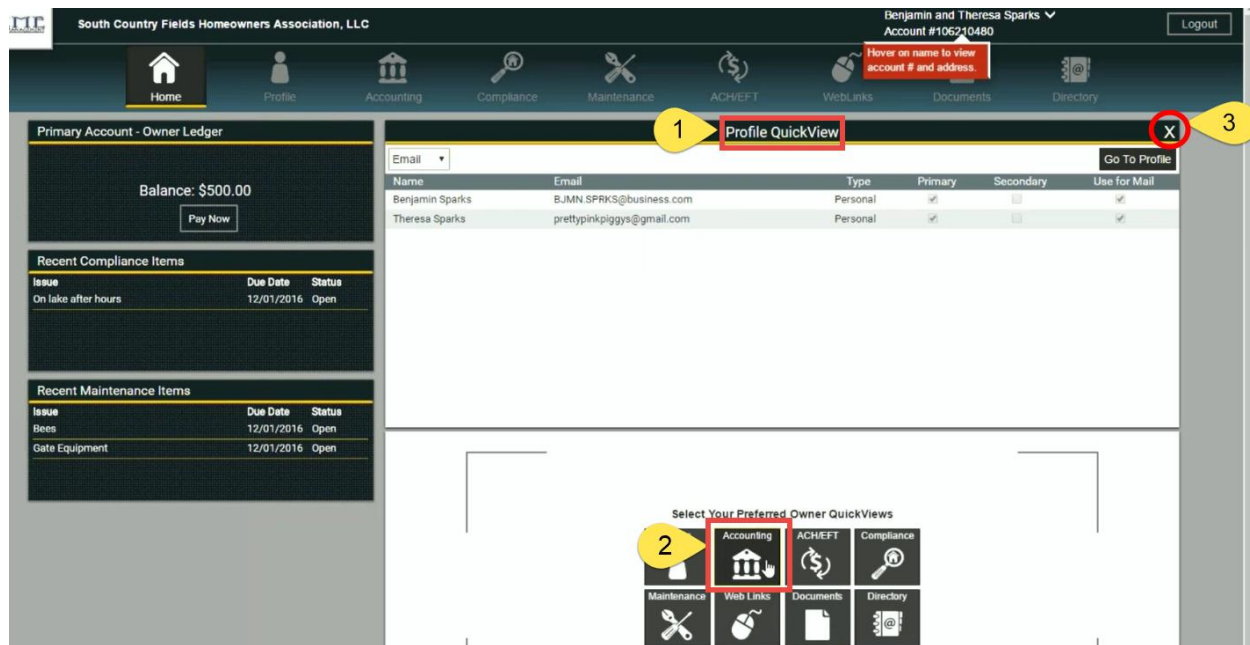
1. Hover cursor over account name to view Account Number and Address.
2. Click an item to assign as your top Quickview.



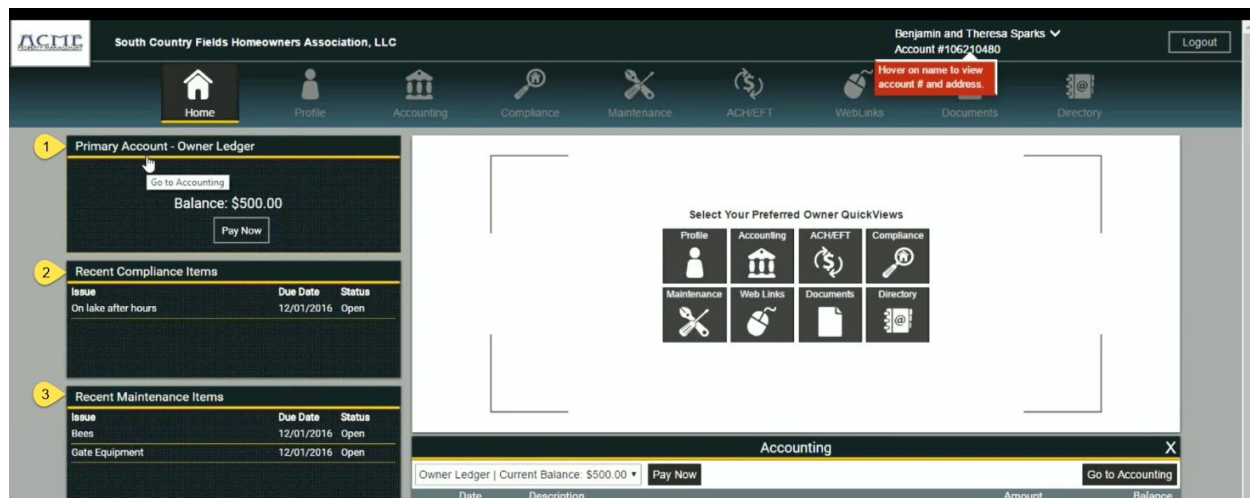
Your Quickviews allow you to view pertinent information at your Home screen.

1. If you would like **Profile** information to show in your top Quickview, click **Profile**.
2. If you would like to have **Accounting** to show at the bottom Quickview, simply click **Accounting**.
3. If you would like to change these at any time, click the X in the upper right corner of the Quickview and make new selections.

Owner Guide to Caliber Portal



1. 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 payment on your account.
2. Recent **Compliance** Items.
3. Recent **Maintenance** Items. This will display issues pertaining to your Unit and Common Areas within the Association.



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

South Country Fields Homeowners Association, LLC

Benjamin and Theresa Sparks
Account #106210480

Home Profile Accounting Compliance Maintenance ACHIEFT WebLinks Documents Directory

Available Records

- Email
- Phone
- Address
- Account
- Family
- Mailing

Profile

Name	Email	Type	Primary	Secondary	Use for Mail	
Benjamin Sparks	BJMN.SPRKS@business.com	Personal	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Theresa Sparks	pretypinkpiggys@gmail.com	Personal	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

A Add Record **B** **C**

2. **Phone**

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

South Country Fields Homeowners Association, LLC

Benjamin and Theresa Sparks
Account #106210480

Home Profile Accounting Compliance Maintenance ACHIEFT WebLinks Documents Directory

Available Records

- Email
- Phone
- Address
- Account
- Family
- Mailing

Profile

Name	Area Code	Phone #	Extension	Type	Primary	Secondary	
Benjamin Sparks	214	000-0000		Home	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Benjamin Sparks	214	000-0001		Cell	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Theresa Sparks	672	000-0002		Cell	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

A Add Record **B** **C**

3. Address

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

South Country Fields Homeowners Association, LLC

Benjamin and Theresa Sparks
Account #106210480

Logout

Home Profile Accounting Compliance Maintenance ACH/EFT WebLinks Documents Directory

Available Records

- Email
- Phone
- Address**
- Account
- Family
- Mailing

Profile

Unit Address

Address	City	State	Zip	Unit
6293 Choctaw Road	Gilbert	AZ	85296	

Mailing Address ☒ Same as Unit

Mail To: Benjamin and Theresa Sparks

Care Of (C/O)

Address	City	State	Zip	Unit
6293 Choctaw Road	Gilbert	AZ	85296	

4. Account

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

South Country Fields Homeowners Association, LLC

Benjamin and Theresa Sparks
Account #106210480

Logout

Home Profile Accounting Compliance Maintenance ACH/EFT WebLinks Documents Directory

Available Records

- Email
- Phone
- Address
- Account**
- Family
- Mailing

Profile

Name	Date of Birth	Username	Password
Benjamin	12/01/1977	Demo77	Change Password
Theresa	06/11/1973	Demo77	Change Password

5. Family

- A. Add family member record

South Country Fields Homeowners Association, LLC

Benjamin and Theresa Sparks
Account #106210480

Logout

Home Profile Accounting Compliance Maintenance ACH/EFT WebLinks Documents Directory

Available Records

- Email
- Phone
- Address
- Account
- Family**
- Mailing

Profile

Name	Birthday	Age
No available Records		

Add Record

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.

****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 'Profile' page of the Caliber Portal. The top navigation bar includes 'Home', 'Profile', 'Accounting', 'Compliance', 'Maintenance', 'ACH/EFT', 'WebLinks', 'Documents', and 'Directory'. The 'Profile' section is active, displaying a table of correspondence preferences. The table has columns for 'Correspondence', 'Mail', 'Email', and an 'Edit' icon. The 'Mailing' section is highlighted with a yellow circle labeled '6'. A red circle labeled 'A' points to the 'Edit' icon in the 'Coupons' row.

Correspondence	Mail	Email	Edit
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.
2. Adjust how many items are shown per page.
3. Print your Account History.

The screenshot shows the 'Accounting' page of the Caliber Portal. The top navigation bar includes 'Home', 'Profile', 'Accounting', 'Compliance', 'Maintenance', 'ACH/EFT', 'WebLinks', 'Documents', and 'Directory'. The 'Accounting' section is active, displaying a table of account history. The 'Accounts and Balances' section is highlighted with a yellow circle labeled '1'. The 'Account History' table is highlighted with a yellow circle labeled '2'. A yellow circle labeled '3' points to the 'Print' button. A yellow circle labeled '2' points to the 'Show 10 items per page' dropdown menu.

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

Compliance

Within Compliance you will be able to view current and past violations issued on your property.

Filters and Controls:

1. Current Items

- A. Magnifying Glass displays Violation Details.

South Country Fields Homeowners Association, LLC

Benjamin and Theresa Sparks
Account #106210480

Logout

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

Filters and Controls

Current Items

All Items

Show 10 items per page

Clear column sorting

Print

Compliance

Date	Violation #	Status	Next Action	Issue	Due Date
11/16/2016	2016-CL00-00019	Past Due	Hearing Notice South Country	On lake after hours	12/01/2016

- 2. By default, it only shows current items. If you would like to view past violations items, you can select **All Items**.

- A. Adjust how many items are displayed per page.
- B. Clear Column Sorting
- C. Print Compliance History

South Country Fields Homeowners Association, LLC

Benjamin and Theresa Sparks
Account #106210480

Logout

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

Filters and Controls

Current Items

All Items

Show 10 items per page

Clear column sorting

Print

Compliance

Date	Violation #	Status	Next Action	Issue	Due Date
11/16/2016	2016-CL00-00019	Past Due	Hearing Notice South Country	On lake after hours	12/01/2016

Maintenance

Within Maintenance, you will be able to see Maintenance Items for your Unit and for Common Areas in the Association.

1. Current Maintenance Items

- A. Magnifying Glass displays Maintenance Details.
- B. Camera displays pictures associated to that Maintenance issue.

South Country Fields Homeowners Association, LLC

Benjamin and Theresa Sparks
Account #106210480

Logout

Home Profile Accounting Compliance **Maintenance** ACHIEFT WebLinks Documents Directory

Filters and Controls

Current Items

All Items

Submit New Request

Show 10 items per page

Clear sorting

Print

Date	Work Order #	Status	Location	Issue	Deadline Date
11/28/2016	2016-CL00-00006	Open	6293 Choctaw Road	Bees	12/01/2016
11/25/2016	2016-CL00-00005	Open	Main Street	Gate Equipment	12/01/2016

2. If you would like to view History select **All items**

- A. You can submit a **New Service Request**.
- B. Adjust how many items are displayed per page.
- C. Clear Sorting
- D. Print Maintenance History

South Country Fields Homeowners Association, LLC

Benjamin and Theresa Sparks
Account #106210480

Logout

Home Profile Accounting Compliance **Maintenance** ACHIEFT WebLinks Documents Directory

Filters and Controls

Current Items

All Items

Submit New Request

Show 10 items per page

Clear sorting

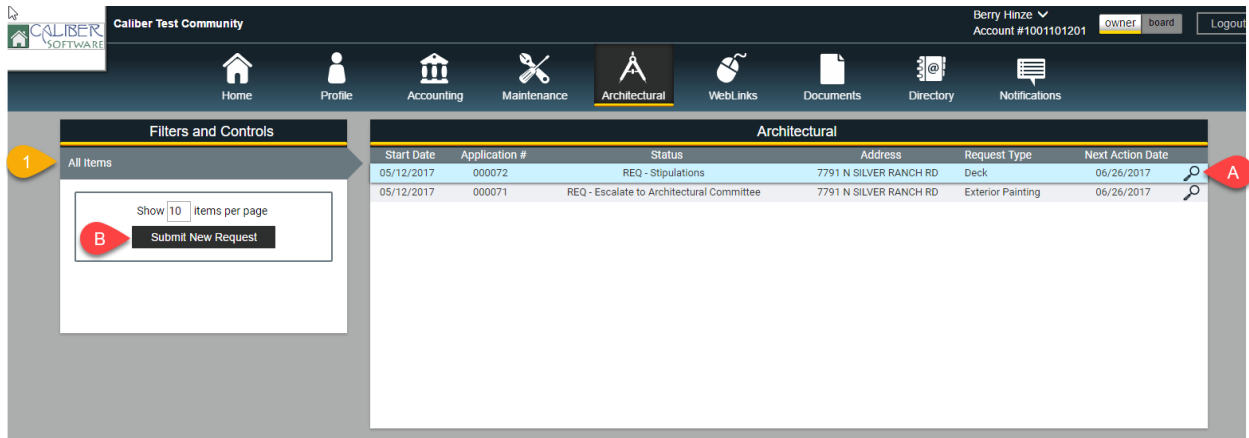
Print

Date	Work Order #	Status	Location	Issue	Deadline Date
11/28/2016	2016-CL00-00006	Open	6293 Choctaw Road	Bees	12/01/2016
11/25/2016	2016-CL00-00005	Open	Main Street	Gate Equipment	12/01/2016

Architectural

Within Architectural the Owner will be able to view their Architectural items.

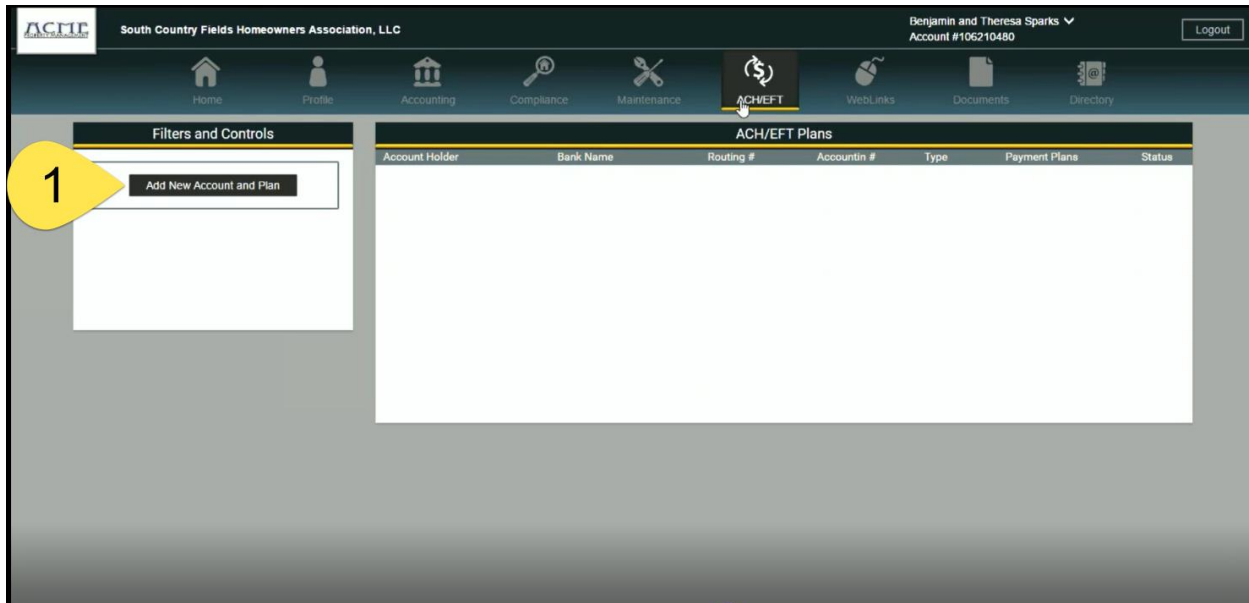
1. View **All items**
 - A. **Magnifying glass** shows Architectural Proceedings.
 - B. Submit new Architectural Request



ACH/EFT

Allows you to set up an ACH/EFT payment plan with your Management Company. Allowing them to deduct an amount monthly.

1. Select **Add New Account and Plan**



New Account and Plan

1. **Bank Account:** Enter all bank information
2. **ACH/EFT Payment Plan:** Enter Owner Name, Start Date, End Date (if there is one)
 - A. **Distribution:** is based off of a percentage (%). If you would like to have 100% of what's due to be deducted put 100. If you only want 50% deducted, put 50.
 - B. **Manual Amount:** If you would like to set a specific amount to be pulled.

***Please keep in mind, if there is nothing due, the manual amount will still pull monthly automatically.**

The screenshot shows a web form titled "New Account and Plan" with a close button (X) in the top right corner. The form is divided into two main sections: "Bank Account" and "ACH/EFT Payment Plan".

Bank Account Section (Annotation 1):

- Account Holder:** A dropdown menu with the text "- Choose Account Holder -".
- Account Type:** A dropdown menu with the text "- Choose Account Type -".
- Bank:** A text input field with the placeholder text "Bank's Name".
- Routing #:** A text input field with the placeholder text "Your Bank's 9-digit routing number".
- Account #:** A text input field.

ACH/EFT Payment Plan Section (Annotation 2):

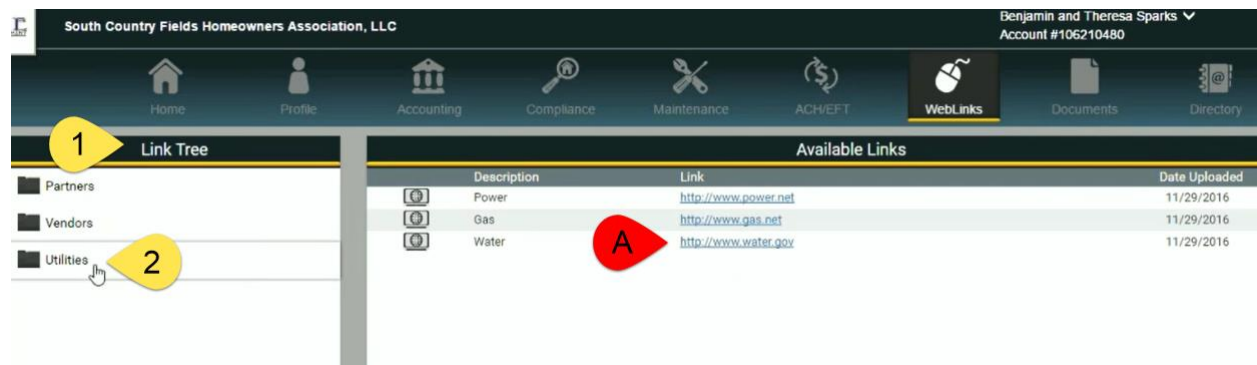
- Name:** A text input field.
- Start Date:** A text input field.
- End Date:** A text input field with the placeholder text "Leave blank for no end date".
- Distribution: (Annotation A)** A text input field containing the value "100". Below this field is a note: "*100 indicates full amount, 0 to enter a manual amount below".
- Manual Amount: (Annotation B)** A text input field with the placeholder text "Enter only if you want to specify the draft amount, \$0.00 uses distribution".

At the bottom of the form is a button labeled "Save Bank and Plan".

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.

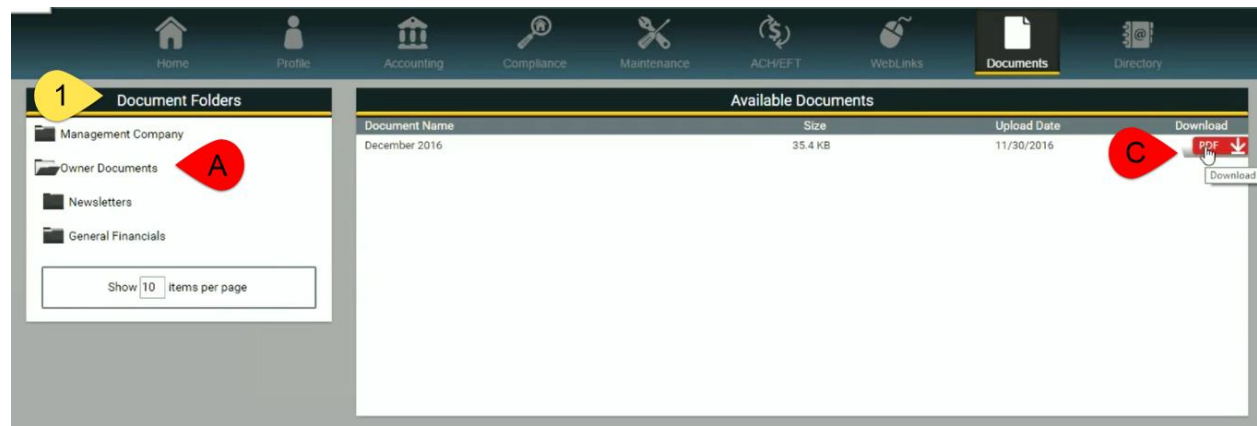
1. **Link Tree:** Your Available Links will be categorized in Folders.
2. Select Folder.
 - A. Clicking Link will direct you to Website.



Documents

Within Documents, you will be able to view any Documents your Management Company has setup to be available to you.

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.

***If you would like to opt out of this please notify your Management Company**

Filters and Controls:

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

Name	Unit Address	Phone	Email
Woodward, Scott & Woodward, Jennifer	5343 Cree Avenue, Lot# 1063	(214) 000-0000; (214) 000-0001; (672) 000-0002	
Widner, Joseph & Widner, Katherine	5315 Cree Avenue, Lot# 1062	(214) 000-0000; (214) 000-0001; (672) 000-0002	
Weintz, Don & Weintz, Kathleen	5033 Iroquois Avenue, Lot# 1072	(214) 000-0000; (214) 000-0001; (672) 000-0002	DonWeintz@email.com
Wallace, Perry & Wallace, Susan	5052 Iroquois Avenue, Lot# 1074	(214) 000-0000; (214) 000-0001; (672) 000-0002	PSWallace@email.com
Waldschmidt, Nicholas & Waldschmidt, Amber	6031 Chippewa Street, Lot# 1033	(214) 000-0000; (214) 000-0001; (672) 000-0002	
Valsin, Leonard & Valsin, Jacqueline	5801 Chippewa Street, Lot# 1023	(214) 000-0000; (214) 000-0001; (672) 000-0002	
Spears, Britney	5015 Apache Drive, Lot# 1003		
Sparks, Benjamin & Sparks, Theresa	6293 Choctaw Road, Lot# 1048	(214) 000-0000; (214) 000-0001; (672) 000-0002	BJMN SPRKS@business.com; prettypinkpiggys@business.com
Snider, Pepper & Snider, Heather	5749 Chippewa Street, Lot# 1021	(214) 000-0000; (214) 000-0001; (672) 000-0002	
Small, Jim & Small, Susan	5161 Iroquois Avenue, Lot# 1084	(214) 000-0000; (214) 000-0001; (672) 000-0002	NameSmallDreamsBig@email.com

Notifications

Owner will be able to view their Architectural item notifications.

1. Mark as Read
2. Mark as Unread
3. Clear Notifications
4. Select number of items per page
5. Print

Notification Item	Mark as
Architectural The following step has been taken in and architectural process: 5/12/2017 - Completed Application Fee. Posted - 05/12/2017	Read
Architectural The following step has been taken in and architectural process: 5/12/2017 - Completed Request Received. Posted - 05/12/2017	Read
Architectural The following step has been taken in and architectural process: 5/12/2017 - Completed Stipulations. Posted - 05/12/2017	Unread
Architectural The following step has been taken in and architectural process: 5/12/2017 - Completed Need Information. Posted - 05/12/2017	Unread
Architectural The following step has been taken in and architectural process: 5/12/2017 - Completed Need Information. Posted - 05/12/2017	Unread