



# Owner Guide to Caliber Portal

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### 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.

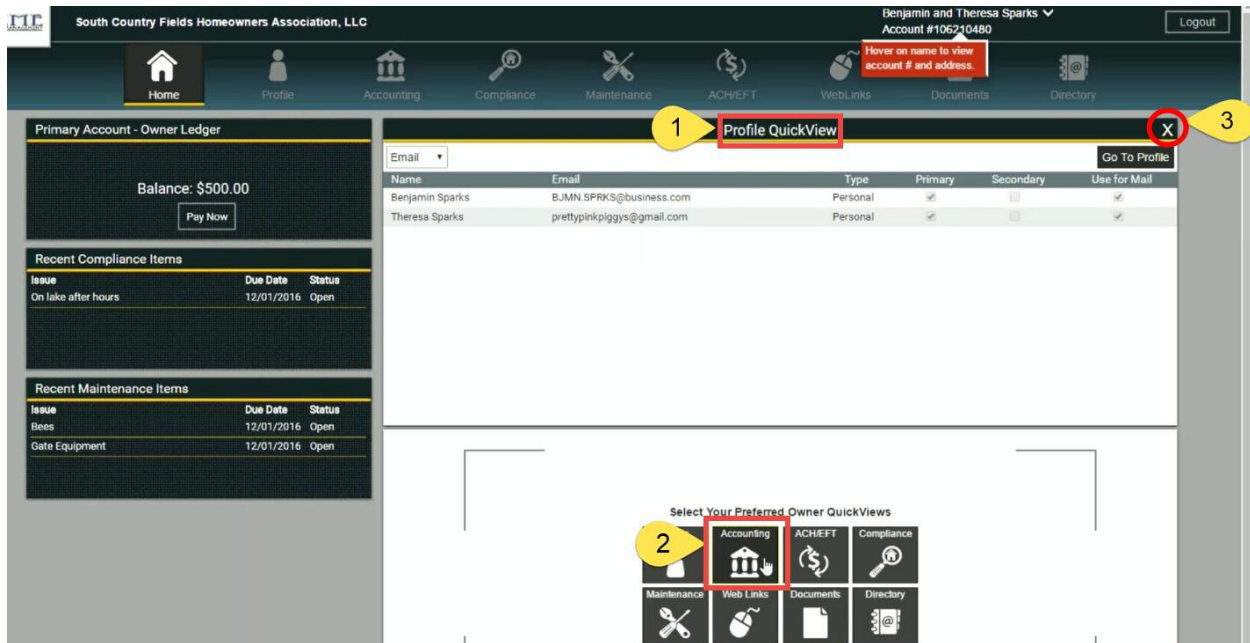
1. Hover cursor over account name to view Account Number and Address.
2. Click an item to assign as your top Quickview.



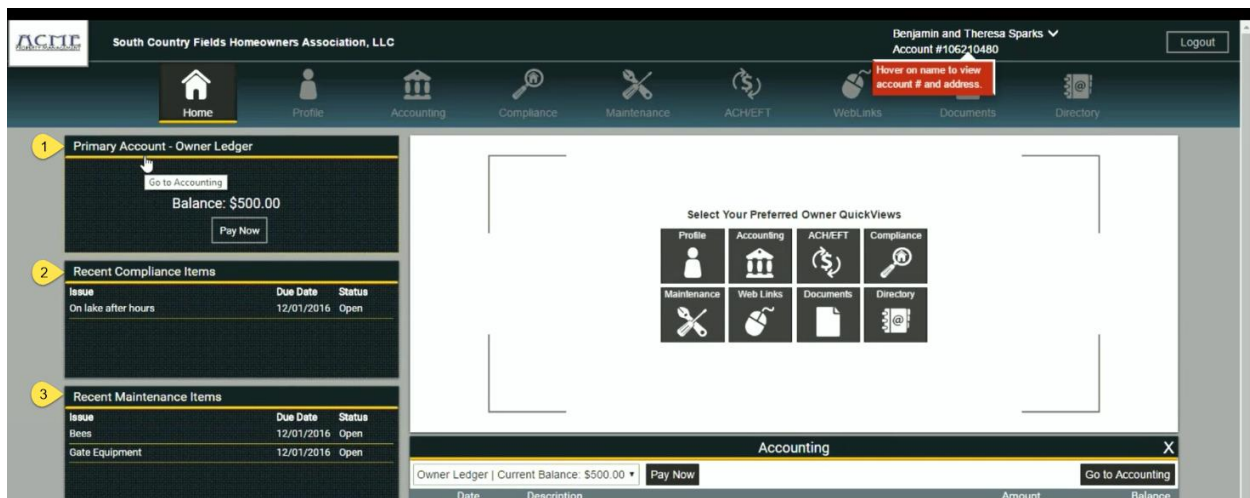
Your Quickviews allow you to view pertinent information at your Home screen.

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.

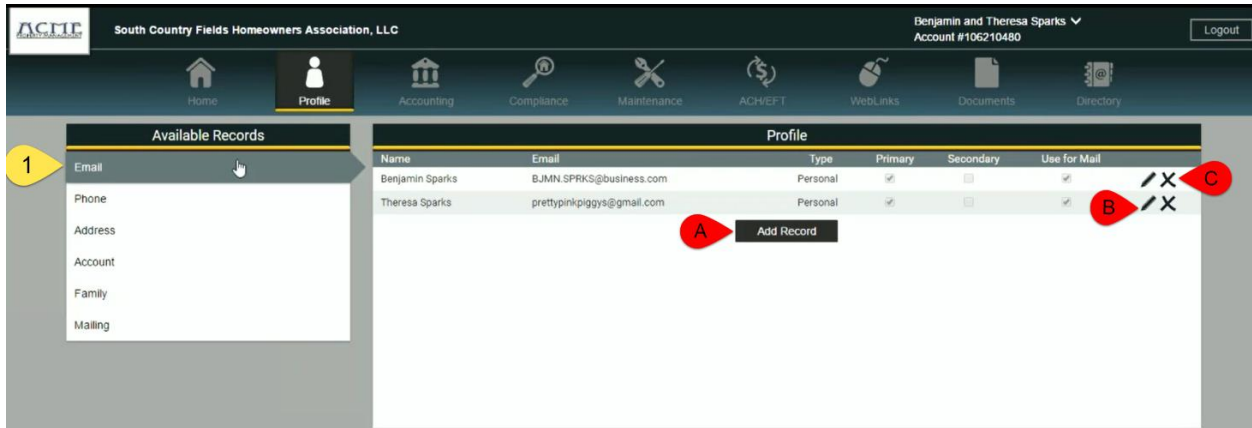


## Profile

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

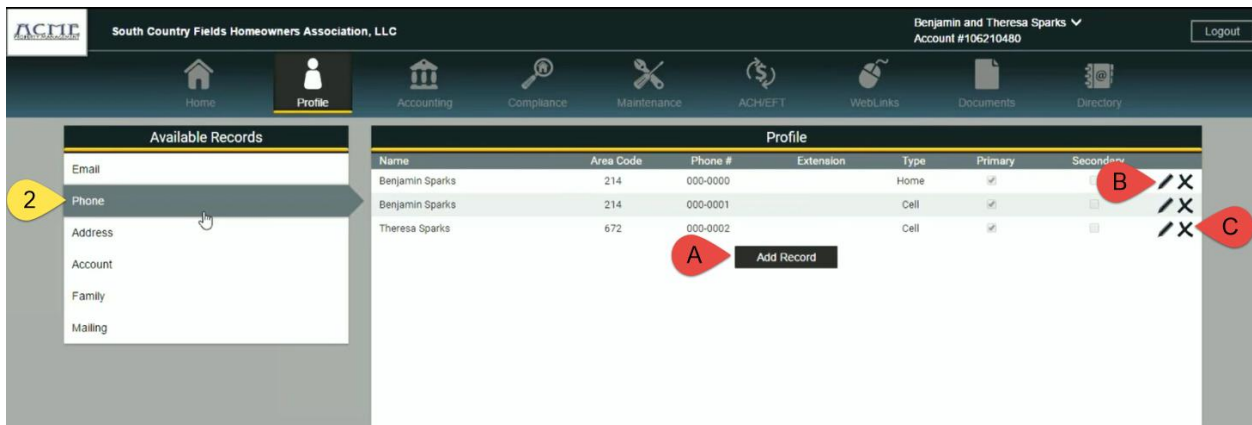
### 1. Email

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



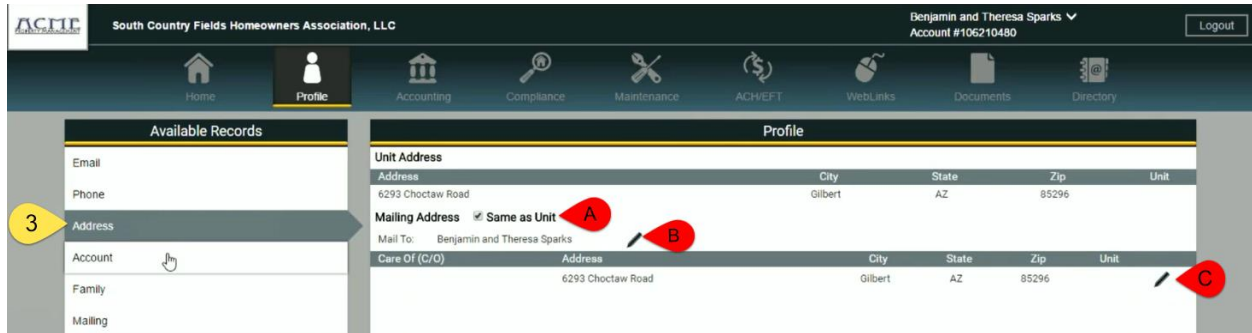
### 2. Phone

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



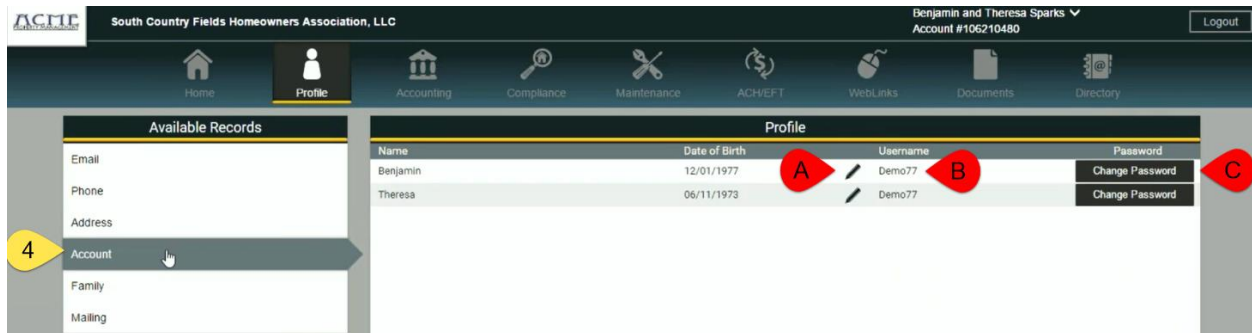
3. **Address**

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



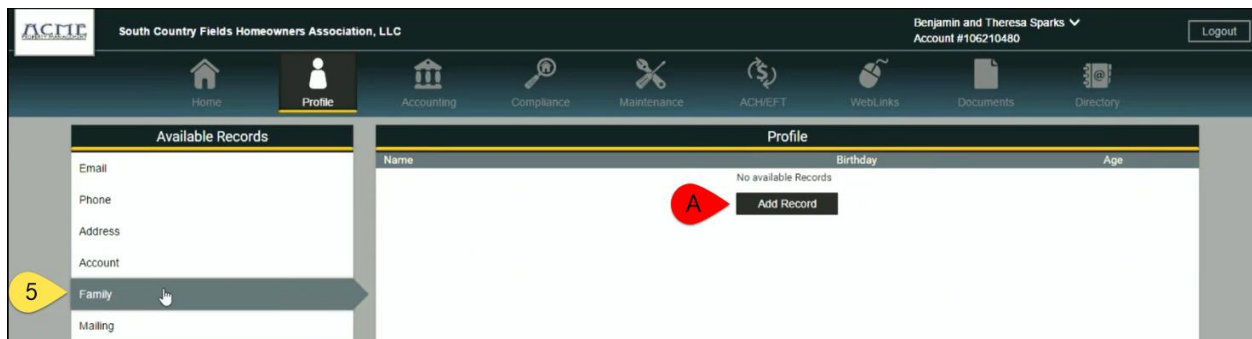
4. **Account**

- A. Edit Date of Birth (this information will only be present if your Management Company has inputted it into Caliber Desktop)
- 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.

**\*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 user is Benjamin and Theresa Sparks, Account #106210480. The 'Available Records' sidebar on the left has a yellow callout '6' pointing to the 'Mailing' option. The main 'Profile' section has a yellow callout 'A' pointing to the 'Edit' icon in the 'Correspondence' table.

Correspondence	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.
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 user is Benjamin and Theresa Sparks, Account #106210480. The 'Accounts and Balances' section shows an 'Owner Ledger' with a 'Pay' button and a balance of '\$500.00'. A yellow callout '1' points to the 'Pay' button. A yellow callout '2' points to the 'Show 10 items per page' dropdown menu. A yellow callout '3' points to the 'Print' button. The 'Account History' table shows a list of transactions from 07/01/2016 to 12/01/2016.

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

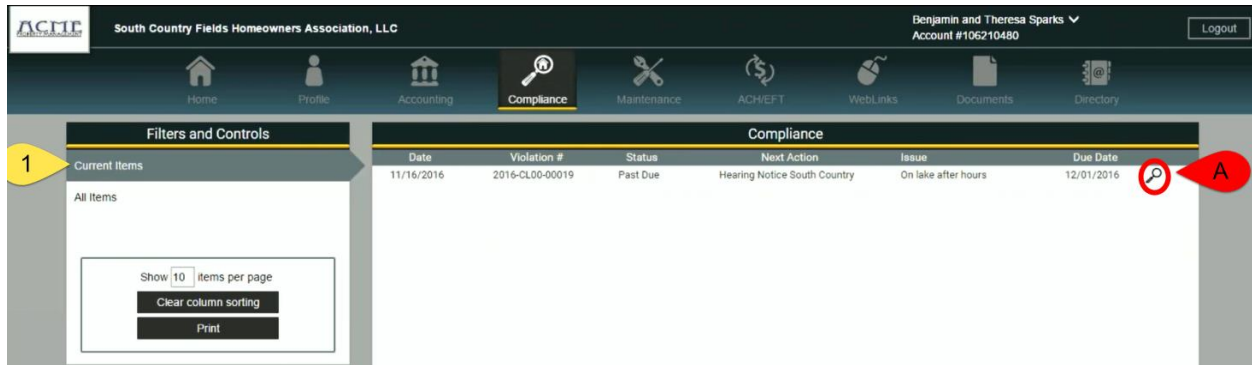
## Compliance

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

### Filters and Controls:

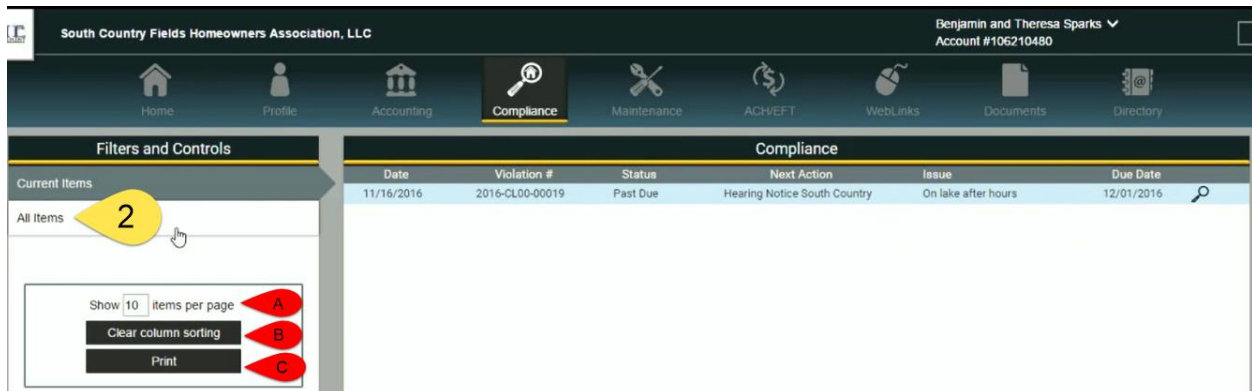
#### 1. Current Items

- A. Magnifying Glass displays Violation Details.



- 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



### 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

Caliber Test Community

Berry Hinze  
Account #1001101201

owner board Logout

Home Profile Accounting Maintenance **Architectural** WebLinks Documents Directory Notifications

Filters and Controls

All Items

Show 10 items per page

Submit New Request

Start Date	Application #	Status	Address	Request Type	Next Action Date
05/12/2017	000072	REQ - Stipulations	7791 N SILVER RANCH RD	Deck	06/26/2017
05/12/2017	000071	REQ - Escalate to Architectural Committee	7791 N SILVER RANCH RD	Exterior Painting	06/26/2017

### 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**

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

Add New Account and Plan

Account Holder	Bank Name	Routing #	Accountin #	Type	Payment Plans	Status
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New Account and Plan

1. **Bank Information:** Enter all bank account information.
2. **ACH/EFT Payments:** Enter the Start Date and End Date (if there is one).
  - A. **% of Amount Due:** 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. **Fixed Amount:** If you would like to set a specific amount to be pulled.

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

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

**Bank Information:** This section is highlighted with a yellow callout "1". It contains the following fields:

- Account holder:** A dropdown menu with "Joe Smith" selected.
- Bank:** A text input field with "Name" as a placeholder.
- Account Type:** A dropdown menu with "- Choose Account Type -" selected.
- Routing #:** A text input field.
- Account #:** A text input field.

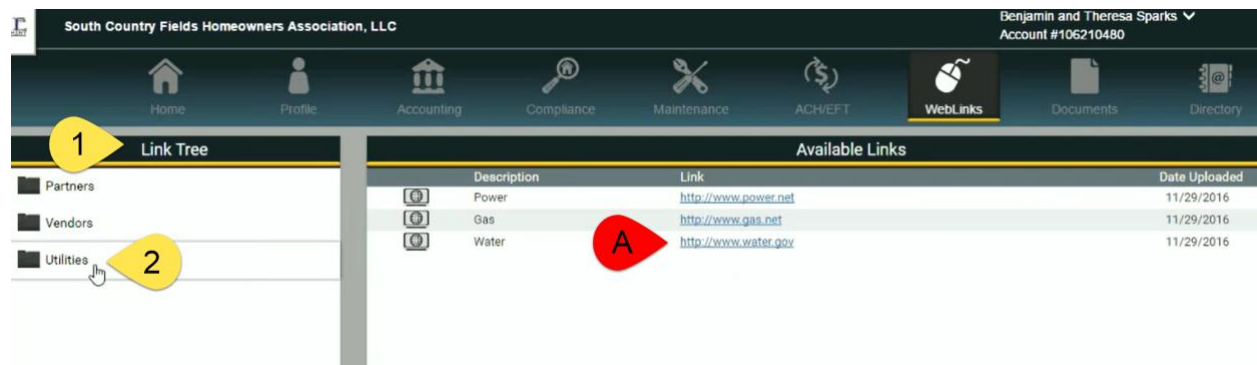
**ACH/EFT Payments:** This section is highlighted with a yellow callout "2". It contains the following fields and controls:

- Start Date\*:** A date input field with the note "\*The date your plan will activate" below it.
- End Date\*:** A date input field with the note "\*Leave blank for no plan expiration" below it.
- Questions?:** A button.
- Select payment type:** A control with two options: "% of Amount Due" (selected, indicated by a radio button) and "Fixed Amount".
- % of Amount Due:** A text input field with the value "100" entered.
- Save and Submit:** A button.
- Close:** A button in the bottom right corner.

### 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.

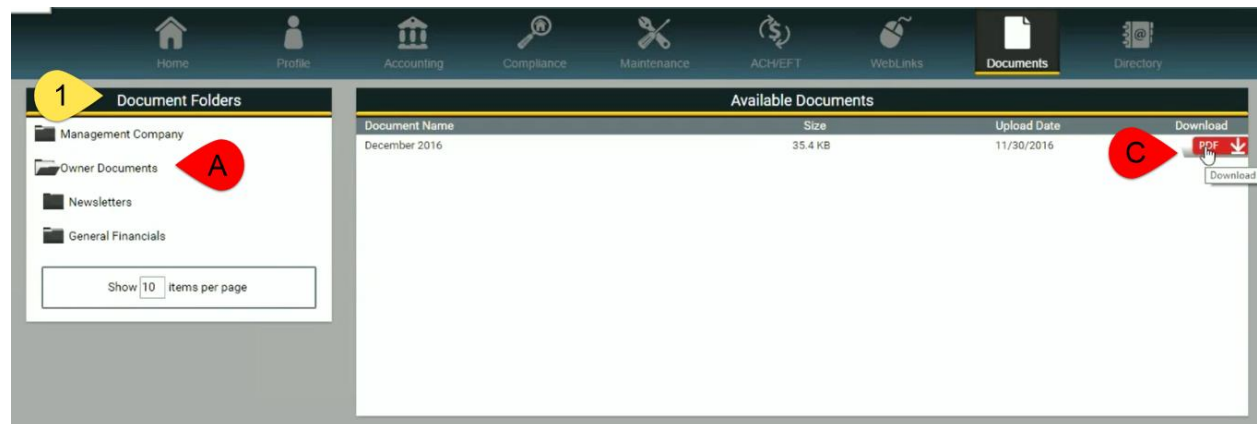
1. **Link Tree:** Your Available Links will be categorized in Folders.
2. Select Folder.
  - A. Clicking Link will direct you to Website.



### 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



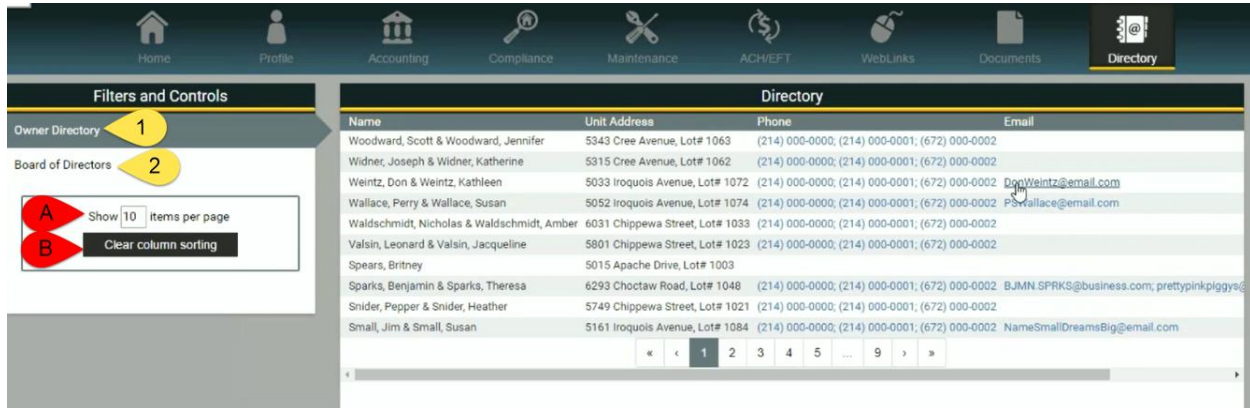
## Directory

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



## 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

