



# **PORTAL NAVIGATION GUIDE**

This tutorial is designed to help homeowners and board members navigate their association's CommunityPro<sup>®</sup> Portal website. Each homeowner has access to each of the areas highlighted in this tutorial and board members have special access to the board room. A separate guide for the board room is available in the resources area of the 'My Account' page on sentrymgt.com.

# **CLICKABLE LINKS**

### CommunityPro Portal Navigation Guide

| 3  |
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|    |



Along the left side of the portal is a list of all available tabs. Each tab contains important information and features for users to access.

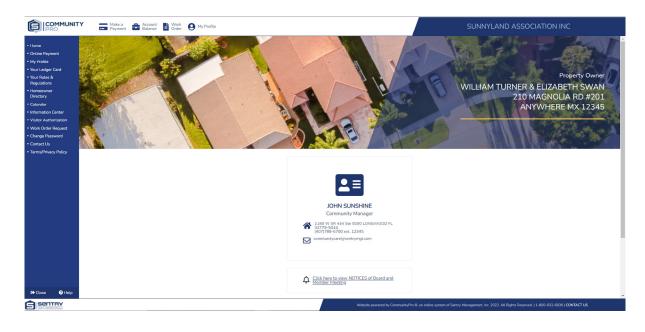
> Your Rules & Regs, Calendar, Visitor Authorization, and Work Order Request are optional and not all communities will see these options

#### • Home

- Online Payment
- My Profile
- Your Ledger Card
- Your Rules & Regulations
- Homeowner Directory
- Calendar
- Information Center
- Visitor Authorization
- Work Order Request
- Change Password
- Contact Us
- Terms/Privacy Policy

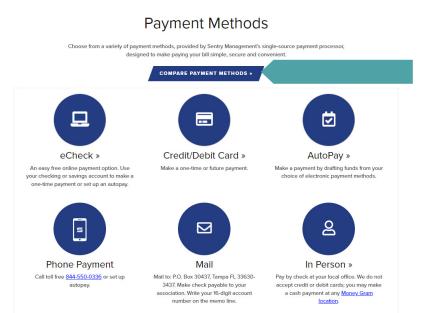
### HOMEPAGE

The homepage allows homeowners to view association contact info, messages from the Board of Directors, details about upcoming events, and links to submit requests and documents.



# **ONLINE PAYMENT**

Users are able to explore the various payment options available. Once selected, each option will provide instructions for use or redirect to the appropriate secure payment platform.



Users can click the compare feature to see what frequency and fees may exist for each payment method.

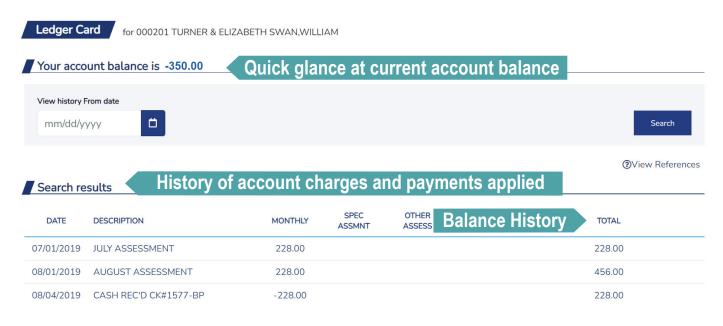
## **MY PROFILE**

Users are able to review account details and update the following:

|                   | Homeowner Infe  | ormation           |            | <br>   |  |   |  |
|-------------------|---|--------------------|------------|--|--|---|--|
|                   | ASSOC   | IATION             | TYPE       | OWNER A/R #                                  | BILL-PA  | AY ACCT #   | SMI DIVISION   |
|                   | SUNNYLAND A   | SSOCIATION INC     |            | 000201                                       | 000SUNN  | NY00002016  | 01   |
|                   | Property Management     Add another proper                          | ent<br>ty          |            | If you own more than<br>choose to add that a | one property in this association, o<br>count to your profile.  | x if you own property in another                                      | association managed by Sentry,   |
| lloor proforonooo | User Preferences  |                    |            |  |  |   |  |
| User preferences  | <ul> <li>Include address in</li> <li>Include phones in I</li> </ul> |                    |            | your community man<br>display in the Homeo   | phone number(s) and email addre<br>ager or choose Contact Us on the l<br>wner Directory. Email is a conveni<br>de Email notices, this will not be th | left menu bar. Please choose whe<br>ont method of receiving informati | ng address, please do so in writ<br>ther you wish your contact info<br>on. If you choose to receive corr |
|                   | Include emails in H   | omeowner Directory |            |  |  |   |  |
|                   | Opt out of assessment   | ient coupons       |            | If you are making onl<br>approved, you may o | ne payments and do not need pay<br>at out of receiving them. Late notic  | ment coupons and envelopes ma<br>te coupons will be mailed if paym    | iled to you when the budget ha<br>ients are not received when due  |
|                   | User Group  |                    |            |  |  |   |  |
| Phone numbers     | Work Phone  | Home Phone         | Cell Phone |  |  |   |  |
| Filone numbers    | 407-788-6700  |                    |            |  |  |   |  |
|                   | Emails  |                    |            |  |  |   |  |
|                   |   |                    |            |  |  |   | O Ar   |
|                   |   |                    |            |  |  |   |  |

When adding emails, users can choose to 'opt-in' to receive email communications. Multiple emails may be entered and user has the option to designate a primary email.

# **YOUR LEDGER CARD**



### YOUR RULES & REGULATIONS

Rules & Regulations tab is an optional feature that provides users with a history of reminder notices received.

| Rules & Reg | gulations Note | ebook    |         |         |                             | 8            |
|-------------|----------------|----------|---------|---------|-----------------------------|--------------|
| From date   | To da          | te       |         | Sort by |                             |              |
| 01/01/2012  | 2 🗂 06         | /15/2022 | ۵       | Mos     | recent first 🗸              |              |
|             |                |          |         |         |                             | Clear Search |
|             |                |          |         |         |                             | View Refere  |
| Search resu | ilts from U    | sers c   | an vi   | ew a    | nd download copies of corre | spondence    |
| USER        | DATE           | STATUS   | LETTER# | CODE    | NOTES                       | OPTIONS      |
| Homeownr    | 06/15/2022     | 0        | MN      | MB      | test                        |              |
| Homeownr    | 06/09/2022     | 0        | MN      | MB      | test                        |              |

# **HOMEOWNER DIRECTORY**

The homeowner directory allows users to view names, addresses, and contact information for other homeowners within the community. The search feature allows users to narrow down the field of results and can be sorted multiple ways including name and street name.

| Homeowner Directory   |  |                                   |            |  |   |
|---|--|-----------------------------------|------------|--|---|
| Group   | Search by<br>Homeowner Last Name 🔷 👻                           | Search for<br>Beginning with      | Search     | First name (optional)                  | Search  |
| Please note: This Directory only contains Search results Homeowner L NAME | those Homeowners who have registered an<br>_ast Name<br>_ADDRE |                                   | directory. | PHONE                                  | EMAIL   |
| A HOME OWNER  |  | AGNOLIA RD #101<br>/HERE FL 12345 |            | 2-333-4455 (Home)<br>1-222-3333 (Cell) | Otest@mail.com<br>hom@mycompany.com<br>mickeymouse999@gmail.com<br>barbaraks.180@gmail.com<br>mrsbaldyga@gmail.com<br>joemaez@gmail.com |
| BANK ON IT NOW,YOU CAN  |  | AGNOLIA RD #204<br>/HERE MX 12345 |            |  |   |

To protect privacy, the directory only includes owners who have granted permission to be included.

### **CALENDAR**

The calendar is an optional feature that enables homeowners to access a master view of all community events and activities. Users have the option to sort by calendar categories to view specific event types.

| Mon |    | Tue | Wed             | Thu | Fri   | Sat | Sun |
|-----|----|-----|-----------------|-----|-------|-----|-----|
|     | 27 | 28  | 29              | 30  | Jul 1 | 2   |     |
|     | 4  | 5   | 6               | 7   | 8     | 9   |     |
|     | 11 | 12  | 13              | 14  | 15    | 16  |     |
|     |    |     | ETING IN JULY ₪ |     |       |     |     |
|     | 18 | 19  | 20              | 21  | 22    | 23  |     |
|     | 25 | 26  | 27              | 28  | 29    | 30  |     |

# **INFORMATION CENTER**

The information center allows users to view, download, and send association records, documents, and forms.

| Information Center   |   |  |
|--|---|--|
| Cabinet Association Records Drawer                         | From<br>mm/dd/yyyy                          | Common records available include:                                      |
| Community Information Folder Governing Documents Subfolder | <ul> <li>▼ 07/11/2022</li> <li>□</li> </ul> | Governing documents<br>Rules & Regulations<br>Architectural Guidelines |
| ALL<br>List by   | •   | Forms<br>Applications<br>Meeting Minutes                               |

Users can search by date and keywords to locate documents quickly and easily.

# **VISITOR AUTHORIZATION**

This tab, is optional for communities with security checkpoints, allows users to add approved visitors for problem free access to the community.

| This form is to authorize visitors to your home THIRTY MINUTES or m<br>access sooner than 30 minutes you need to call the gate. Using this fe<br>Fields marked with a red asterisk (*) must be entered. | ore from now for today or tomorrow. If you need to provide<br>rrm you can submit a request for up to three visitors. |                         |
|---|--|-------------------------|
| Your name   | Your address   |                         |
| WILLIAM TURNER & ELIZABETH SWAN   | 210 MAGNOLIA RD #201 ANYWHERE MX 12345   |                         |
| Special Comments  |  |                         |
|   |  |                         |
| #1 *  |  |                         |
| #1 *<br>Visitor's First & Last Name   | Expected Arrival Date *  | Expected Departure Date |
|   | Expected Arrival Date * 07/22/2022   | Expected Departure Date |
|   |  |                         |
| Visitor's First & Last Name   |  |                         |
| Visitor's First & Last Name<br>Complete only if calling in additional visitors  |  |                         |

### **Step 1: Homeowner Portal** Click "Visitor Authorization" on the left menu.



#### **Step 2: Visitor Authorization Form** Homeowners will complete the boxes that apply.

NOTE: Homeowners have the option to authorize more than one visitor on this form.

| IPRO                           | Payment Balance  | Order Orrofile   | SUNNYLAND ASSOC  |                                     |   |                         |                           |
|--------------------------------|--|--|--|-------------------------------------|---|-------------------------|---------------------------|
| e<br>e Payment                 | Visitor Authorization Form   |  |  |                                     |   |                         |                           |
| ofile<br>edger Card<br>Rules & | This form is to authorize visitors to your hom<br>access sooner than 30 minutes you need to<br>Fields marked with a red asterisk (*) must br | e THIRTY MINUTES or more from now for today<br>call the gate. Using this form you can submit a rec | or tomorrow. If you need to provide<br>guest for up to three visitors. |                                     |   |                         |                           |
| ations                         | Your name  | Your address   |  |                                     |   |                         |                           |
| ry                             | LEROY JETHRO, GIBBS  | 210 MAGNOLIA RD #20  |  |                                     | Make a P Account                            | Wark O Ma               |                           |
| r<br>tion Center               | LERUT JETHRU. GIBBS  | 210 MAGNOLIA RD #20.   | ANTWHERE MA  | COMMUNITY<br>PRO                    | Make a Account Balance                      | Order O Profile         | SUNNYLAND ASSOCIATION INC |
| oom                            | Special Comments   |  |  |                                     | 1 *   | ,                       |                           |
| Authorization                  |  |  |  |                                     | r's First & Last Name                       | Expected Arrival Date * | Expected Departure Date   |
| der Request                    |  |  |  | Online Payment     My Profile       |   | 07/13/2022              | 07/13/2022                |
| Us                             |  |  |  | Your Ledger Card                    |   |                         |                           |
| rivacy Policy                  | #1 •   |  |  | • Your Rules &                      | mplete only if calling in additional visite | rs                      |                           |
|                                | Visitor's First & Last Name  | Expected Arrival Date *  | Expected Dep   | Regulations<br>arture • Homeowner   | 2   |                         |                           |
| e 🕑 Help                       |  | 07/13/2022   | 07/13/20   | Directory                           | r's First & Last Name                       | Expected Arrival Date   | Expected Departure Date   |
| VATTRY                         |  | enversed by Community Day & an ordinary estamol Cont   | - Marcanet See 2022 All Distan Decement                                | Catendar     • Information Center   |   | mm/dd/yyyyy             | mm/dd/yyyy                |
|                                |  |  |  | Boardroom     Visitor Authorization | 3   |                         |                           |
|                                |  |  |  |                                     | r's First & Last Name                       | Expected Arrival Date   | Expected Departure Date   |
|                                |  |  |  | Contact Us     Terms/Privacy Policy |   | mm/dd/yyyy              | mm/dd/yyyy                |
|                                |  |  |  |                                     | your confirmation to                        |                         |                           |
|                                |  |  |  | 0                                   | cbruner@sentrymgt.com                       |                         |                           |
|                                |  |  |  |                                     |   |                         |                           |

#### **Step 3: Homeowner Confirmation Email**

Homeowners have the option to send a confirmation email. Homeowners can select the email address on file, add a new email address, or utilize both by selecting both options and clicking "Submit".

|   | Payment Balance E Order                                    | • Home                | JNNYLAND ASSOCIATION INC |
|---|--|-----------------------|--------------------------|
| • Home<br>• Online Payment<br>• My Profile  | Visitor's First & Last Name #3                             | Expected Arrival Date | Expected Departure Date  |
| <ul> <li>Your Ledger Card</li> <li>Your Rules &amp;<br/>Regulations</li> <li>Homeowner</li> </ul> | Visitor's First & Last Name                                | Expected Arrival Date | Expected Departure Date  |
| Directory Calendar Information Center Boardroom   | Send your confirmation to O cbruner@sentrymgt.com          |                       |                          |
| Boardroom     Visitor Authorization     Work Order Request     Contact Us                         | <ul> <li>nbidondo@hexacta.com</li> <li>Email to</li> </ul> |                       |                          |
| • Terms/Privacy Policy  |  |                       | Submit                   |

NOTE: When homeowners hit "submit" an email will also be sent to the manager's email on file.

# **WORK ORDER REQUEST**

The work order request tab is an optional feature that gives homeowners the ability to submit a work order directly through the portal website. The feature is helpful for reporting issues like roof leaks, irrigation issues, exterior repair needs and more.

| the CommunityPro work order system then verified      | ess hours and should NOT be used for emergencies. If your reques |  |
|---|--|--|
| Thetas marked with a red asterisk ( ) must be entered |  |  |
| Summary Description                                   | Job Location   |  |
|   | 210 MAGNOLIA RD #201   | <ul> <li>Include Directions<br/>take a left on sunny street</li> </ul> |
| Contact   | Special Instructions   |  |
| Homeowr   | 1er  |  |
| Detailed Description                                  |  |  |
|   |  |  |

- 1. Log in to CommunityPro<sup>®</sup> by visiting <u>sentrymgt.com</u> and selecting "My Account" from the main menu If you do not have an account, please register <u>HERE</u>
- 2. Once you are logged in, select the link for "Work Order Request" from the navigation on the left



### 3. Fill in the required fields

|  | Make a<br>Payment  | Account<br>Balance   | Work Order          | My<br>Profile                | SUNNYLAN                           | ND AS       | SSOCIATION INC                                    |
|--|--|----------------------|---------------------|------------------------------|------------------------------------|-------------|---|
| Home     Online Payment     My Profile     Your Ledger Card                              | Work Order Re  | a work order reque   | est pertaining to a | essociation maintenance resp | onsibilities. Your request will be | e logged ir | nto   |
| Your Rules &<br>Regulations     Homeowner  | Your request will be re<br>emergency, please cal<br>Fields marked with a r | l your local office. |                     | rs and should NOT be used    | for emergencies. If your request   | is an       |   |
| Directory Calendar Information Center  | Summary Description  |                      |                     | Job Location                 |                                    |             | Include Directions<br>take a left on sunny street |
| Boardroom     Visitor Authorization  | Contact  |                      |                     | Special Instructions         |                                    |             |   |
| <ul> <li>Work Order Request</li> <li>Contact Us</li> <li>Terms/Privacy Policy</li> </ul> | Detailed Description   |                      |                     |                              |                                    |             |   |
| Terms macy Policy  |  |                      |                     |                              |                                    |             |   |
| 🕒 Close 🛛 Ə Help   |  |                      |                     |                              |                                    |             |   |

### 4. Select "Save"

Once saved, you and your Community Manager will receive a confirmation email from donotreply@sentrymgt.com to the email address you used to create your CommunityPro account.