OWNERS FORUM – USERS GUIDE

CONNECTED MANAGEMENT

V-21.09

CONTENTS

OVERVIEW

This guide provides instructions for using all of the online tools and resources made available to members of your Association. If you need additional support after reviewing this document, please contact our support team at support@connectedmanagement.com.

THE OWNERS FORUM

While the use of our online resources is not required, we think they'll make your life much easier. If you need any assistance, just ask, and a member of our team will help you with anything you need.

The idea behind accessing our online resources is simple: your association has one dedicated website where your unit-owners and board members can go to access all of the available Connected tools. This website, or portal, is named the *Owners Forum*.
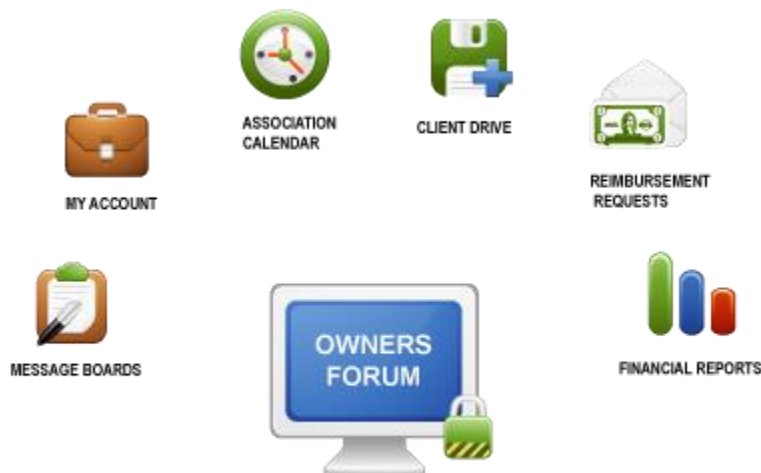
Graphic 1: Logging into the Owners Forum provides access to a number of powerful tools and resources.

You can access your association's *Owners Forum* from any web browser. After you log in, you will find menus that provide access to any tool that you'd like to use. The following sections of this chapter discuss the *Owners Forum* and each of the tools or resources available therein.

ACCESSING THE OWNERS FORUM

The *Owners Forum* is accessed through a web browser. The site is optimized for mobile devices and will automatically provide a modified layout when accessed from a mobile device.

Web Address: https://clients.connectedmanagement.com

Log-in Credentials: The log-in credentials for the *Owners Forum* site are provided by Connected Management and are shared by all members of your Association. If you are a member of the Board, you have a separate username/password that is shared by your fellow board members.

All unit owners will use the same username and password to access the *Owners Forum*. Board members share a username and password that is separate from the unit owner's account.

The account credentials were provided to all owners in our Welcome Letter. Board members are provided with the shared log-in credentials from your manager. You can contact any member of our support team to obtain the user account information for your Association.

Additional User Account Required: One of the resources available within the *Owners Forum*, named the *My Account Portal*, requires a separate username and password for security purposes. The *My Account Portal* provides users with access to their personal financial ledger and therefore requires a user account that is specific to each owner. This means that the shared username and password that you use to log in to the *Owners Forum* cannot be used to log in to the *My Account Portal* section of the site.
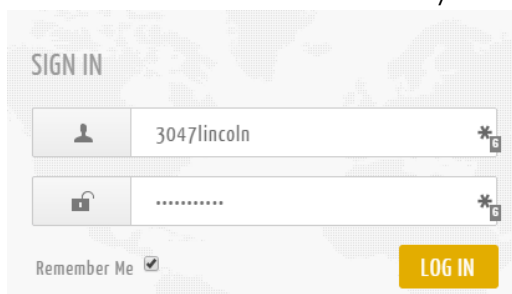
LOG-IN

In order to access any of the resources within the *Owners Forum*, you must first log-in using your Association's shared user account. (See the previous section for details on the shared accounts)

There are two different options for entering your log-in information.

Option 1 - Quick Log in

1) From the home page, click the icon from the top of the screen.
2) Enter your Association's shared username and password in the pop up window.
3) Click the **LOG IN** button to access the system.
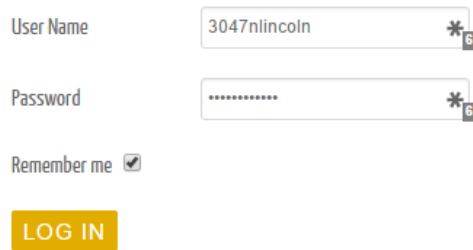
Option 2 - Traditional Log in

1) From the home page, click the **LOGIN** option from the menu at the top of the screen.

2) Enter your Association's shared username and password in the form.

3) Click the **LOG IN** button to access the system.

User Name	3047nlincoln
Password	••••••••••••
Remember me	☑

LOG IN

LOG-OUT

When you have completed your session on the *Owners Forum*, logging out is easy.

1) Click the down chevron next to your user name.

Hi 3047 N Lincoln Board, ⌄

2) Then click the **LOG OUT** option that is presented.

Hi 3047 N Lincoln Board, ⌃

LOG OUT
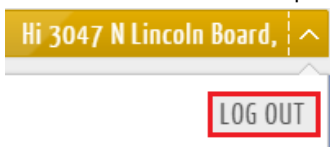
CHANGING PASSWORD, USERNAME

Since the user accounts for the *Owners Forum* are shared, users do not have the ability to change the username or password. On occasion it will be necessary to change the password associated with an account. For example, when there is a board member change. In such cases, your management team at Connected will make the appropriate changes and update the affected users.

If you believe that a password change is needed, please contact your manager.

ENCRYPTION

All connections to the *Owners Forum* are encrypted over a secure, encrypted connection.

🔒 https://clients.connectedmanagement.com/
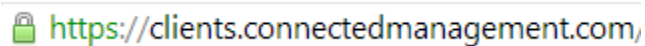
WHAT'S NEXT?

The remainder of this document provides instructions for the individual resources available within the *Owners Forum.*

RESOURCE 1: *THE CLIENT DRIVE*

The *Client Drive* provides board members and unit owners with convenient around-the-clock access to the association's important documents and files.

All of the association's files are stored in a single, centralized and secure location. Board members have the ability to upload files directly to the *Client Drive*, consequently making the files immediately available to other board members or unit owners. (Depending on the destination of the uploaded files) In addition to documents uploaded by the board, the *Client Drive* has been fully integrated with the Connected Management financial systems, providing access to all of your association's financial reports and invoices. You can review each invoice or bill received and processed by Connected on behalf of your association.

The *Client Drive* is built on the latest technology allowing users access to all available files and documents through nearly any mobile device, including IPads, tablets and Kindles. (See the *Mobile Access* section below for details)

Examples of the items stored on the *Client Drive*:

1) The association's current and historical financial reports. (See *Financial Reports* section later in this document)
2) All association invoices/bills received and processed by Connected.
3) Association's governing documents – Declaration, Bylaws, Rules & Regulations.
4) Board uploaded documents – Meeting minutes, budgets, meeting notices.
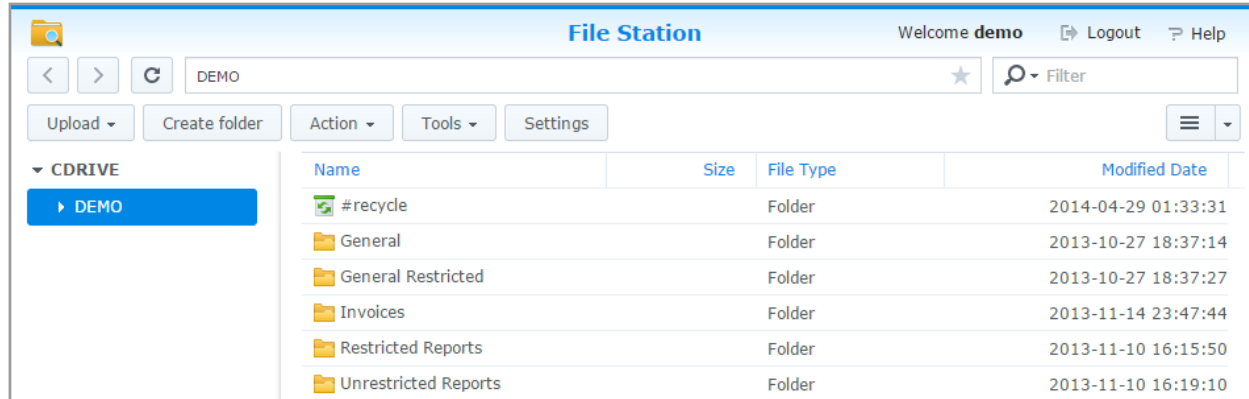
Graphic. 2: Sample view of the Client Drive

By default the *Client Drive* contains five (5) primary folders, which may contain files or additional subfolders. This is similar to the file structure on most personal computers, making it second nature to navigate for many. Board members can add as many additional subfolders as they would like to categorize their association's information.
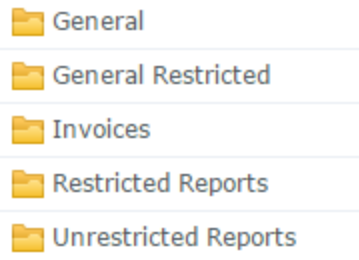
Graphic 2.1: Primary five folders of the Client Drive. Each contains files and/or subfolders.

The *Client Drive* is permissions based, which allows board members to have access to **all** folders on the *Client Drive* while "standard" unit owners have access to a subset of the available information. This distinction between board member and unit owner also controls a user's ability to view, download, upload, modify, or delete files. The following table details the five primary folders, the default sub-folders and the associated access levels for board members and unit owners. Access rules can be changed upon request.

| Folder Name	Parent Folder	Description	Board Access	Unit Owner Access
General	None	Primary folder for association documents and files. Board members upload most of the files available in this folder.	Read/Upload/Delete	Read
• **Finances**	General	Subfolder to store annual budgets and other financial documents.	Inherited	Inherited
• **Governance**	General	Subfolder to store governing documents such as bylaws, rules & regulations, etc. Initial copies provided by board are uploaded by Connected during setup process.	Inherited	Inherited
• **Meeting Minutes**	General	Subfolder to store meeting minutes uploaded by board. IL Condo Act requires meeting minutes to be stored for 7 years.	Inherited	Inherited
• **Property**	General	Subfolder to store property related items. Connected uploads all property inspections to this section.	Inherited	Inherited
General Restricted	None	Section is only accessible by board members. Legal documents, delinquency related items and other confidential files.	Read/Upload/Delete	No Access
Invoices	None	Contains subcategories of years (2012..2014) and months (Jan...Dec)	Read	Read

		storing all invoices/bills received and processed by Connected.		
Restricted Reports	None	At the end of each month our full suite of ten (10) financial reports is generated and uploaded to this section. **Accessible by board members only.** Subfolders categorize and store all historical reports by month/year. (See *Financial Reports* section below for full details on this reporting suite)	Read	No Access
Unrestricted Reports	None	A subset of the monthly financial reports is made available to all unit owners in this folder. These reports do not provide any delinquency or owner ledger information. Subfolders categorize and store all historical reports by month/year. (See *Financial Reports* section below for full details on this reporting suite)	Read	Read

Note: Subfolders inherit the permissions of the parent folder by default. 'Read' includes ability to download.
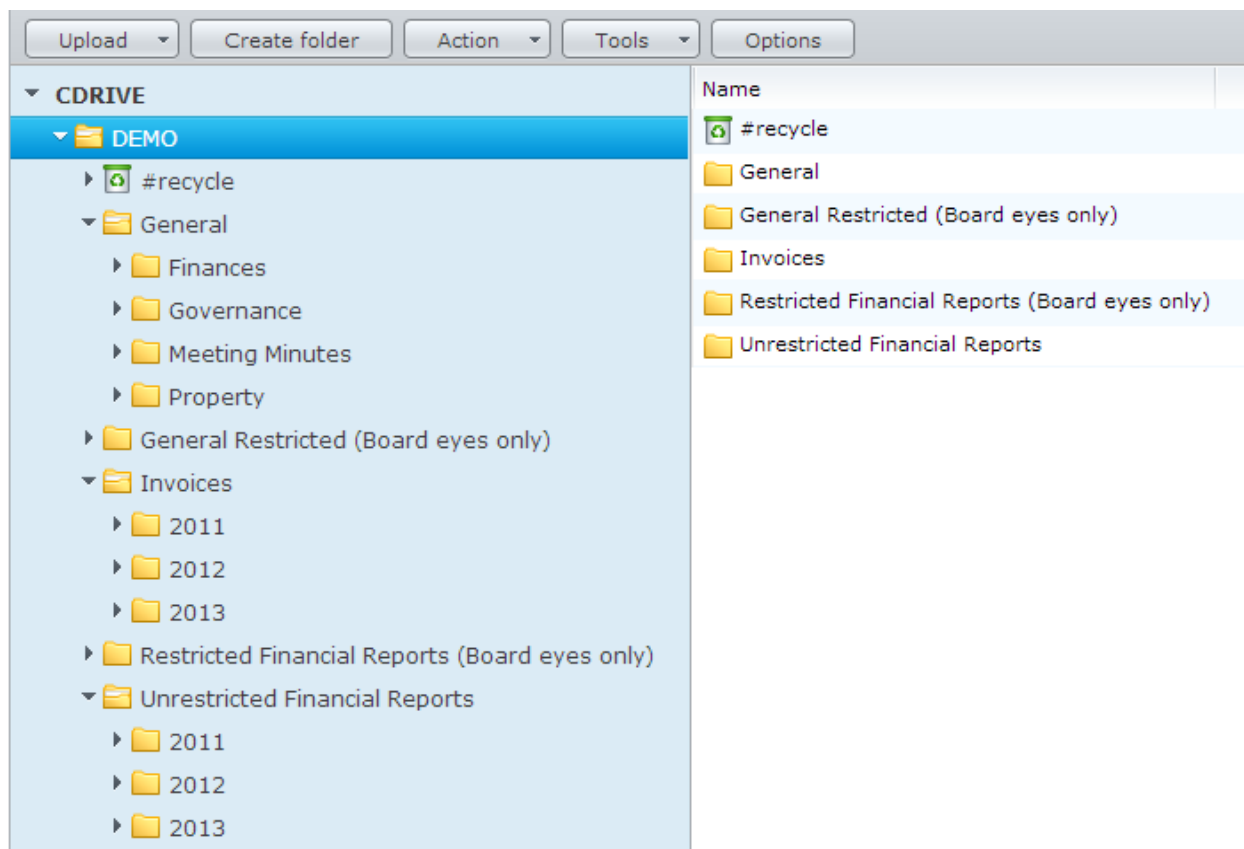
Graphic 2.2: Default folder structure within the Client Drive

ACCESSING THE CLIENT DRIVE

The *Client Drive* uses the same user accounts as the Owners Forum. The first time that you attempt to access the *Client Drive* you will be prompted to enter a username and password. Enter the same shared log-in credentials that you use for the *Owners Forum*.
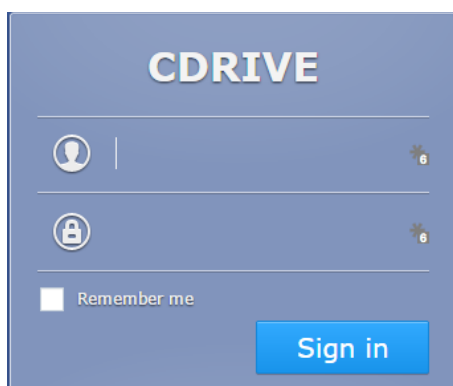
Graphic 2.3: Access to the Client Drive is controlled by the same user accounts as the Owners Forum. Enter your Association's shared username and password.

**Please note that certain sections of the Owners Forum are incompatible with the Safari web browser. Safari is the built-in web browser found on many Apple devices. We recommend installing Chrome or another free web

browser on your Apple device for accessing the Owners Forum.

BROWSE FILES

After logging in you can browse the folders and files on the *Client Drive* in the same fashion as on your personal computer. Clicking a folder shows the contents of that folder, which may be files or subfolders.

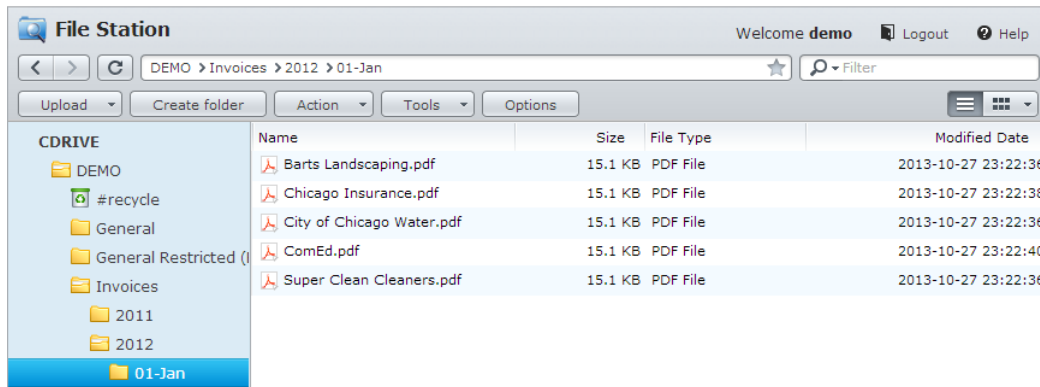*Graphic 2.4: Folder navigation within the Client Drive*

DOWNLOAD FILES & FOLDERS

You can view or download any number of files, or complete folders, in seconds. You can even download a full copy of the entire *Client Drive* to your computer with a single click! (You must have 'read' privileges in order to download a file or folder)

DOWNLOAD ONE OR MORE *FILES*

1) Select the file(s) that you'd like to download by selecting the items from the right-hand window.
2) With your chosen files selected, click the **Action** button from the top menu (or right click) and select **Download**.
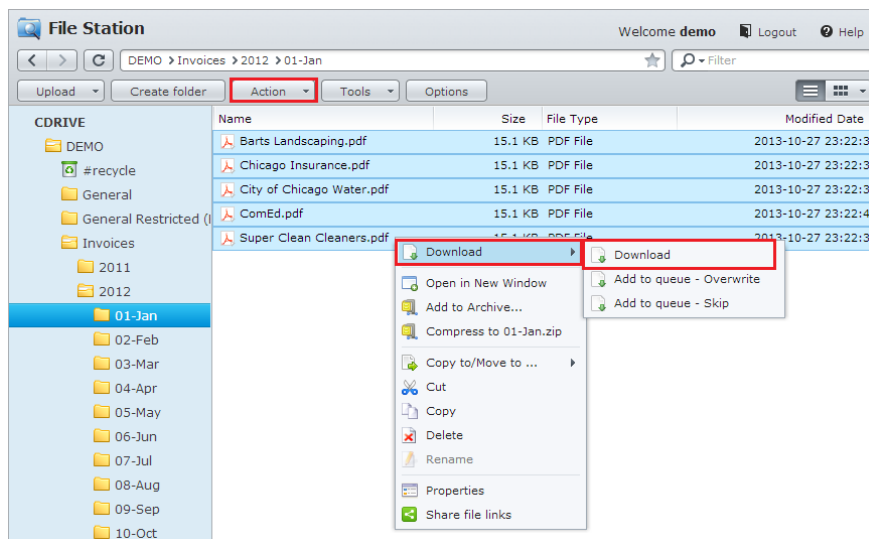
Graphic 2.51: Select files and click the **Action** *button.*

3) Select the destination where you would like the files saved on your computer. The files will then be saved in a single zip file. (See graphic below)
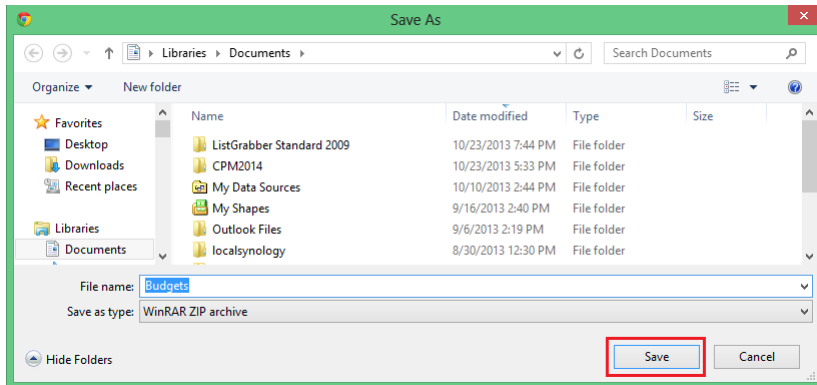
Graphic 2.52: Select destination to save files to your computer

DOWNLOAD ONE OR MORE *FOLDERS*: (INCLUDES ALL FILES WITHIN THE FOLDER)

1) Select the folder(s) that you'd like to download by selecting the items from the right-hand window.
2) With your chosen folders selected, click the **Action** button from the top menu (or right click) and select **Download**.

Graphic 2.53: Select a folder and click the **Action** *button.*

3) From the resulting pop-up window, specify the destination where you would like the folder saved on your computer. The folder will then be saved.

UPLOAD FILES

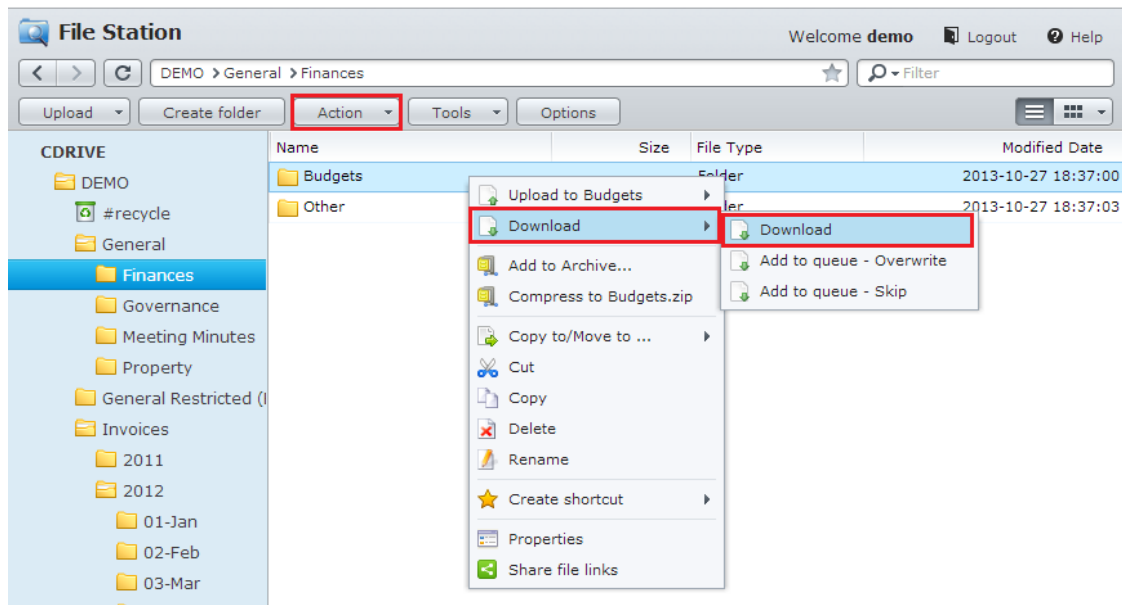You can upload files and folders to the *Client Drive* to make them available to the board or all unit owners. Any files or folders that should only be accessible by the board should be uploaded to the ***General Restricted*** folder. (Or sub-folders within) The 'General' folder, and sub-folders, are accessible by all users.

You can use either of the methods below to upload files and folders to the *Client Drive*. (You must have 'upload' privileges on a folder in order to upload files to it.)

DRAG AND DROP METHOD

1) Navigate to the folder where you would like your files, or folders, to be uploaded. (You must have 'Upload' privileges on the folder)
2) Drag any folder(s) or file(s) from your computer to the right hand panel of the Client Drive. You will be shown a "***Drop Files Here***" image indicating that you may drop your item. (See the sample below)
3) Drop the items and they will be uploaded to the selected folder.
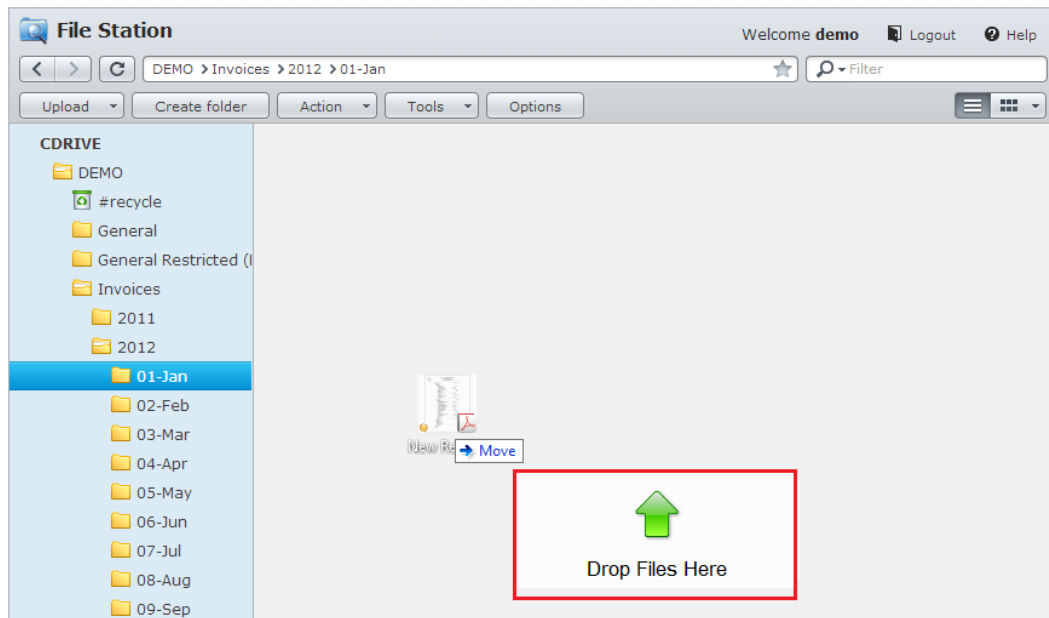
*Graphic 2.61: Drag and drop files or folders to the drop zone to upload*

TRADITIONAL UPLOAD METHOD

You can also upload files in a more traditional fashion using the ***Upload*** button from the top tool bar.

1) Navigate to the folder where you would like your files, or folders, to be uploaded. (You must have 'Upload' privileges on the folder)

2) Click the ***Upload*** button from the top tool bar
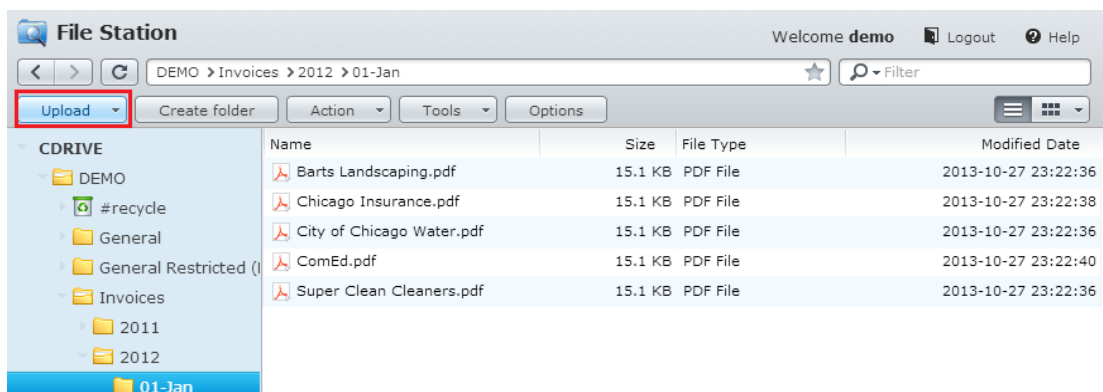
*Graphic 2.63: Click the **Upload** button to initiate your upload*

3) Select the files to be uploaded from your computer and click "**Ok**" to complete the process.

SHARE & EMAIL FILES

You can easily share the files on the *Client Drive* with anyone, including non-owners. This feature will allow you to provide 3rd parties with a link to download the folders/files that you have shared.

You can optionally password-protect the link and/or set an expiration date so that the link can only be used for a certain amount of time. This feature works great for sharing large files with outside parties that do not have access to the Client Drive.

1) Select the folder(s) or file(s) that you would like to share in the right hand panel of the screen.
2) Click the **Action** button, then select **Share file links.** (see sample below)
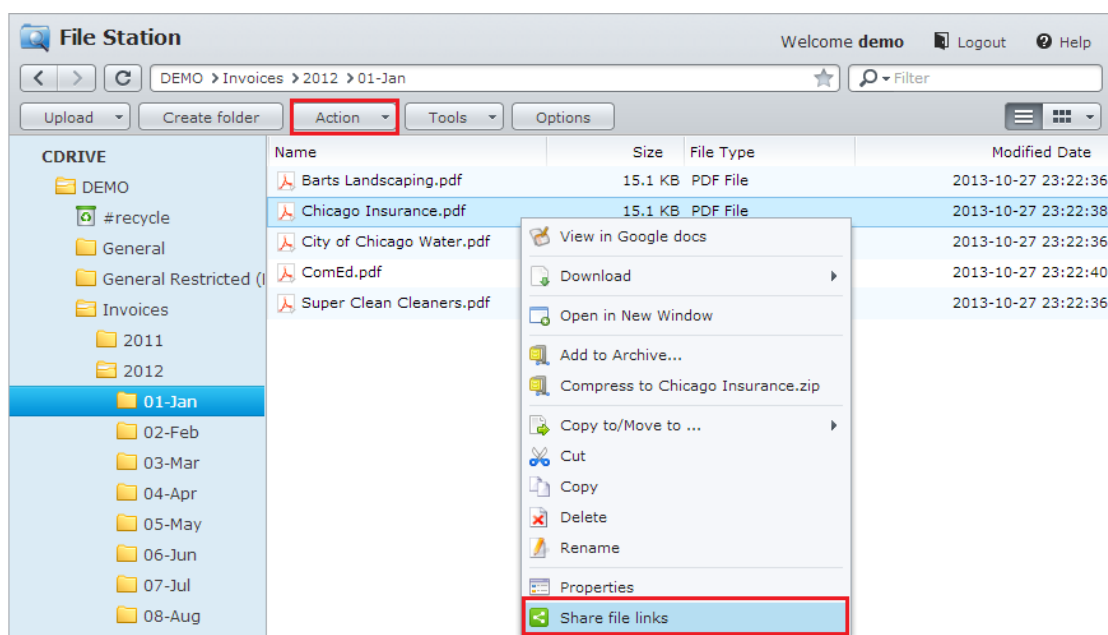
3) From the new window you will be presented with a link to your shared items. (See the sample below) You can copy/paste this link into an email or otherwise share the link with a 3rd party.

Share File Links

[Validity period]   [Password]

Create shared link(s) to allow people without DSM user credentials to download the shared file(s).

File path: /DEMO/Invoices/2012/01-Jan/Chicago Insurance.pdf

Password:

Copy the links below or **Mail** the links to share your files. ⓘ

Chicago Insurance.pdf

http://share.connectedmanagement.com:80/fbsharing/2NkOA2Ii

[OK]   [Cancel]

LINK OPTIONS

When creating a shared link you may use the buttons available from the top menu to utilize the advanced options.

Share File Links

[Validity period]   [Password]

a) **Validity period** – Use this option to set the length of time that the link will be usable. Attempts to download the shared files after this period will be denied.

Share File Links

[Validity period]   [Password]

Create shared link(s) to allow people without DSM user credentials to download the shared file(s).

File path: /DEMO/Invoices/2012/01-Jan/Super Clean Cleaners.pdf

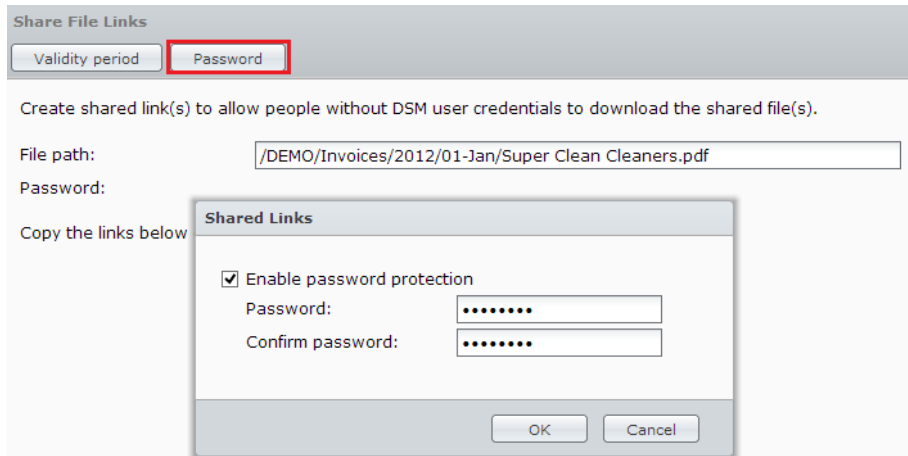Password:

Copy the links below

Shared Links

☑ Customize validity period

Validity period: A week

[OK]   [Cancel]

b) **Password –** Use this option to tie a password to the link. Attempts to download the shared files without a matching password will be denied.

Graphic 2.68: Use the password option to secure the access to the shared items.

MOBILE ACCESS

The *Client Drive* allows mobile access through an "App" available for Android, iOS, and Windows Phone devices. You can view and manage any file on your *Client Drive*, whether they are photos, videos, or documents. You will be able to review all folders, move files around, or filter and find a particular file by typing in the key words. All can be done on-the-go.

The **DS File** app is available for free on Apple App Store, Google Play or Windows Phone Store.

MOBILE: INSTALLING THE APP

The App used to access the *Client Drive* is named "*DS File*" created by *Synology Inc*. and can be installed and used for free on your mobile devices. Depending on the type of your device, install the App from the following locations:

IOS: Install from the Apple App Store.
https://itunes.apple.com/us/app/ds-file/id416751772?mt=8

Android Devices: Install from Google Play (formerly Android Market).
https://play.google.com/store/apps/details?id=com.synology.DSfile&hl=en

Windows Devices: Install from the Windows Phone Store.
http://www.windowsphone.com/en-us/store/app/ds-file/eec8dc9a-3964-4d8d-b1b0-3277d7aea241

After the installation has been completed, launch the application to access your association's *Client Drive*.

Graphic 2.81: Egnyte logo as found in Google Play

MOBILE: LOG IN

After launching the application you will be shown a simple log in screen like the graphic below. Complete the form as follows:

Address: share.connectedmanagement.com
(*Do not include 'http://')
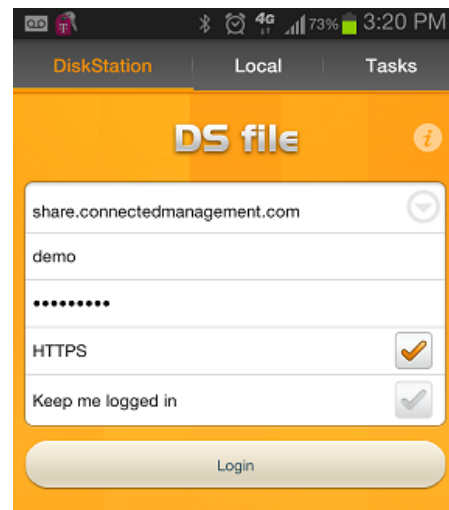**Username**: <your shared username>
Password: <your shared password>
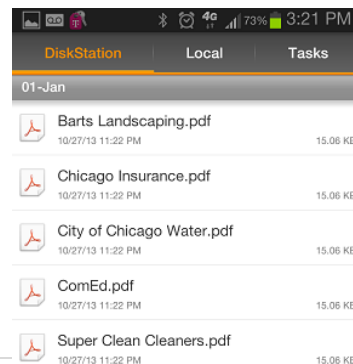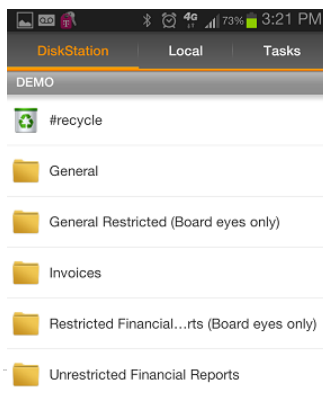**HTTPS:** Checked

Tap the "Login" button to access the *Client Drive*.

Graphic 2.82: Android App – Login screen

MOBILE: BROWSE FILES

After logging in you will be shown your *Client Drive* folders just like when using a web browser. Navigate by touching the folders and browse the files and subfolders available.

MOBILE: VIEW/OPEN/PLAY FILES

Just like the web site version of the *Client Drive* you can easily view (open) any file on the Client Drive. Simply tap on the file and it will begin to open automatically. The file will be opened using the default application configured on your mobile device for that type of file.

MOBILE: DOWNLOAD FILES

Perform the following steps to download folders and files to your mobile device:

1) Navigate through the folder structure to find the folder/file that you'd like to download.
2) On your phone, tap/press the menu button to be presented with additional options. See the sample below.
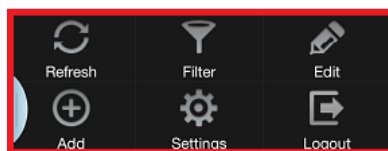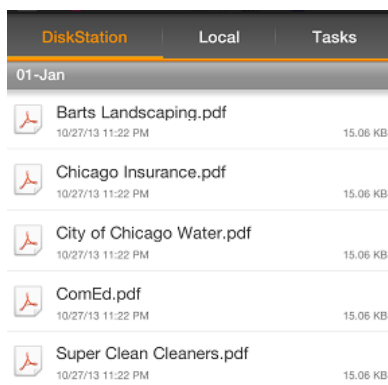
Graphic 2.85: Menu options (Android)

3) Tap the **Edit** icon from the menu. This will add checkboxes ☐ to the right of the folders/files on your screen.
4) Select any items that you would like to download to your mobile device.
5) On your phone, tap/press the menu button again to be presented with additional options as shown in the sample below.
6) Tap the **Download** icon from the bottom menu to save the selected items to your mobile device.
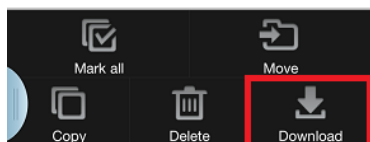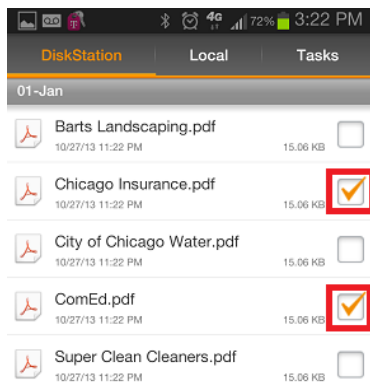
*Graphic 2.86: Tap the **Download** option to initiate a download to your device (Android)*

MOBILE: UPLOAD FILES

Perform the following steps to upload items from your mobile device to the Client Drive.

1) Navigate through the folder structure to find the folder where you would like to upload your items.
2) On your phone, tap/press the menu button to be presented with additional options. Tap the **Add** icon from the menu as shown in the following screenshot
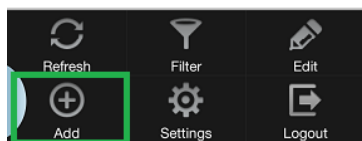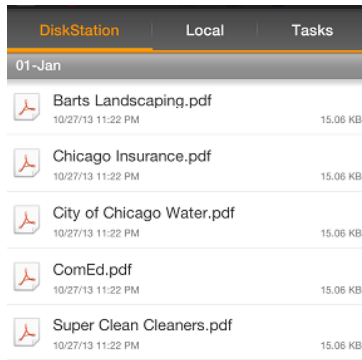
Graphic 2.87: Use the Add option to upload files (Android)

3) From the new pop-up window, tap the **Upload** option to select the files from your mobile device to upload to the Client Drive.
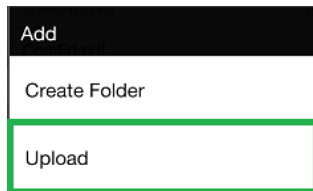
*Graphic 2.88: Tap **Upload** to complete the process (Android)*

MOBILE: CREATE NEW DIRECTORY (FOLDER)

Perform the following steps to create a new folder on the Client Drive.

1) Navigate through the folder structure to find the location where you would like your new folder to reside.
2) On your phone, tap/press the menu button to be presented with additional options. Tap the **Add** icon from the menu as shown in the following screenshot.
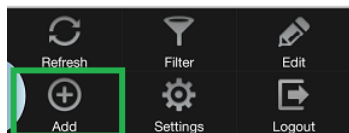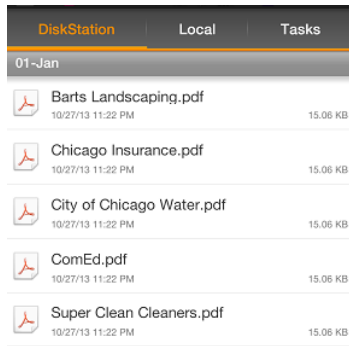
Graphic 2.89: Tap the Add option to create a new folder (Android)

3) From the new pop-up window, tap the **Create Folder** option.
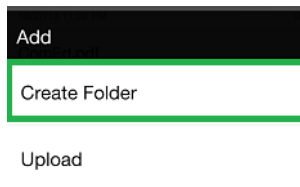
*Graphic 2.90: Tap **Create Folder** (Android)*

4) Enter the name of your new folder in the form and tap **OK** to create the folder.
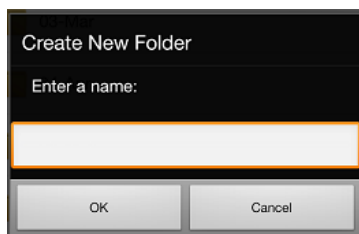
RESOURCE 2: FINANCIAL REPORTS

Our financial reporting system provides board members and unit owners with a thorough review of the Association's financial activity and overall standing. Reports are saved and categorized by year and month allowing you to view, download or print the reports from the current or any previous month.

TIMING OF REPORT GENERATION

Our suite of financial reports are automatically published to your Association's *Client Drive* throughout the month. The reports generated will cover the financial activity from the *previous* month.

For example, the financial reports generated during May will cover the financial transactions from April. The reports will be stored in the April folder. (Since they cover April's financial activity)

The financial reports also include year-to-date information. To continue with the example above, reports covering April's financial transactions will also include year-to-date information. (January through April)

ACCOUNTING FORMAT (CASH VS ACCRUAL)

The full suite of monthly financial reports are provided in both cash and accrual formats. The name of the pdf package will indicate the type. Users can refer to the style of reporting that suits their needs.

ACCESSING THE REPORTING FOLDERS

After accessing the *Client Drive* you will find your Association's financial reports within the **Restricted Financial Reports** and **Unrestricted Financial Reports** folders.
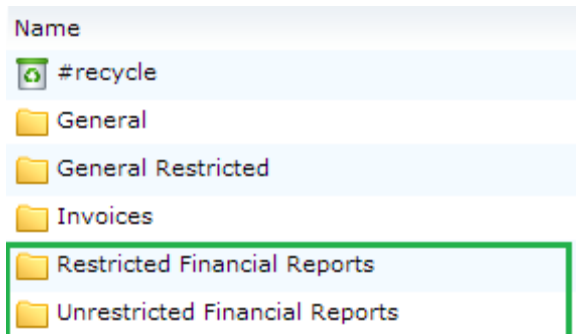

As detailed earlier in this document the **Restricted Financial Reports** folder is for board member consumption whereas the **Unrestricted Financial Reports** is meant for non-board members. The primary difference is that reports detailing unit owner delinquency are only available to board members.

Folder Name	Description	Board Access	Unit Owner Access
Restricted Reports	At the end of each month our full suite of 12 financial reports is generated and	Read	No Access

	uploaded to this section. **Accessible by board members only.**		
Unrestricted Reports	A subset of the monthly financial reports is made available to all unit owners in this folder. These reports do not provide any delinquency or owner ledger information.	Read	Read

Within the **Restricted Financial Reports** and **Unrestricted Financial Reports** folders you will find financial reports stored and categorized in folders named by year and month. For example, you would find the financial reports covering *February* of *2014* within the "02 – Feb" subfolder of the "2014" parent folder as shown in the sample graphic below.

This hierarchy provides quick and easy access to all of your association's current and historical financial information. Navigate through the subfolders to locate the month and year that you are interested in. You can then open, download or share* one or more of the financial reports. (*Refer to the Client Drive section of this manual for instructions on sharing folders and files with 3rd parties)
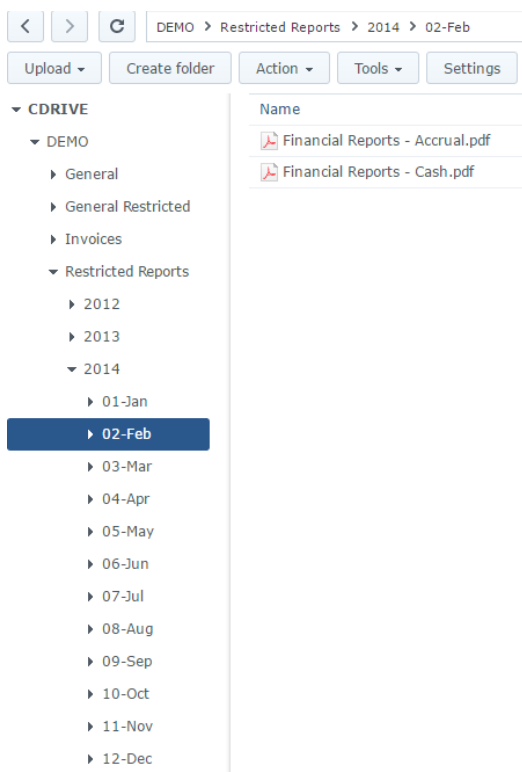
Graphic 6: Sample reporting folder structure.

FINANCIAL REPORTS FOR OWNERS

Non-board members do not have access to the full suite of financial reports due to the inclusion of owner delinquencies and other privileged information. For transparency purposes, however, we have made certain financial reports available to all owners through the *Unrestricted Financial Reports* folder.

The financial information available mirrors what is legally required to be provided to the unit owner upon request, per the Illinois Condominium Act. This proactive approach is meant to educate and involve the unit owners and avoid complaints about a lack of information or insight.

Note: Upon board request, access to these reports by unit owners can be removed.

REVIEW OF THE FINANCIAL SUITE

The remaining sections of this chapter detail the financial reports found in the reporting suite.

REPORT: UNIT TRANSACTION LISTING

Description: Shows all transactions that were posted during the specified date range; broken down by unit. This essentially shows each owner's ledger for the specified date range.

Date Range: Two versions of this report are provided.

1) Last month start **through** Last month end.
2) This year start **through** last month end.

REPORT: AGED RECEIVABLES

Description: Displays a list of all current owners with a balance and groups the age of the balance into 30 days old, 31-60 days old, 61-90 days old, and 91+ days old.

Date Range: As of last month end.

REPORT: BILLS PAID

Description: The Bills Paid report displays all bills paid for the selected date range. Provides details of each bill.

Date Range: Last month start **through** Last month end.

REPORT: GENERAL LEDGER

Description: The General Ledger report displays all individual transactions for each account within your chart of accounts for a specified period.

Date Range: Last month start **through** Last month end.

Format: Available in both Cash and Accrual formats.

REPORT: BALANCE SHEET

Description: The Balance Sheet shows the financial position of your Association as of a certain date. The balance sheet reveals the resources (assets) and the claims against those assets (liabilities and owner's equity).

Date Range: As of Last month end.

Format: Available in both Cash and Accrual formats.

REPORT: PROFIT & LOSS

Description: The Profit & Loss report displays all income and expenses for the Association. This report subtracts the expenses from the income to calculate the net income for the Association.

Date Range: Two versions of this report are provided.

1) Last month start **through** Last month end.
2) This year start **through** last month end.

Format: Available in both Cash and Accrual formats.

REPORT: PROFIT & LOSS PREVIOUS YEAR COMPARISON

Description: Profit & Loss Previous Year Comparison report shows income and expenses for the Association during a specified date range. This report compares last year's account subtotals to this year's account totals for the same period and itemizes the difference (dollar amount and percent) for each account.

Date Range: This year start **through** Last month end.

Format: Available in both Cash and Accrual formats.

REPORT: PROFIT & LOSS 12 MONTH RECAP

Description: The Profit & Loss 12 Month Recap displays all income and expenses (with totals) on a month-by-month basis during your selected date range.

Date Range: This year start **through** Last month end.

Format: Available in both Cash and Accrual formats.

REPORT: FISCAL YEAR BUDGET

Description: The Fiscal Year budget report displays the current budget as of a selected date. The report is run as a Profit and Loss layout.

The report shows:

- Monthly budgeted amount for each income and expense account.
- Total income and total expenses for each month.
- Yearly budgeted total for each account.
- Net income for each month.
- Total net income for the fiscal year.
- Graphical representation of budgeted income, expenses, and net income.

Date Range: As of Last month end.

REPORT: BUDGET COMPARISON

Description: The Budget Comparison report compares the budgeted income and expenses and actual totals for one selected date range against the budgeted income and expenses and actual totals for a second selected date range.

Date Range: Last month start **through** Last month end – *COMPARED AGAINST*- This year start **through** Last month end

Format: Available in both Cash and Accrual formats.

RESOURCE 3: MESSAGE BOARDS

The Message Boards allow for easy communication between the owners of the association. Communications occur similar to email, but allow for conversations to be organized and stored so that the information can be searched by users in the future. The message boards are a great way to send key updates to the unit owners in conjunction with traditional methods such as postal mail.

ACCESSING THE MESSAGE BOARDS

After logging into the *Owners Forum* click the "Message Boards" option from the main page. (See sample below)
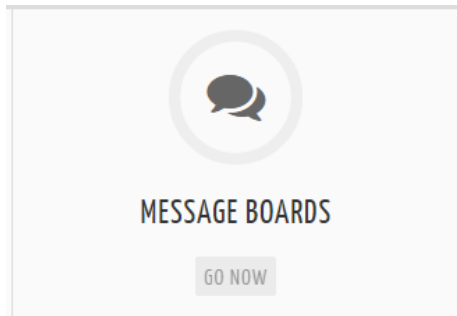
THE BOARDS

Within the Message Board system you will find the two main "Boards", or categories, as shown in the following screenshot. The boards are where conversations are tracked and stored in logical categories to make it easy for users to browse the active topics.
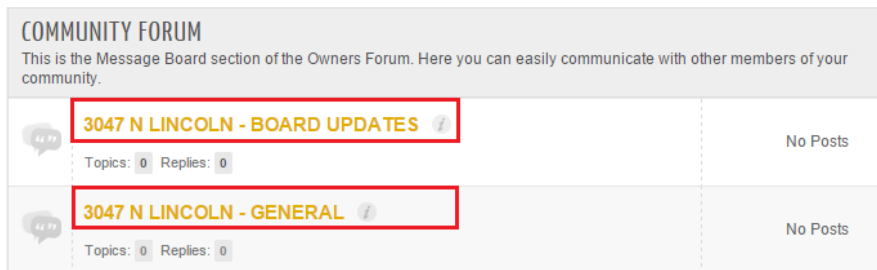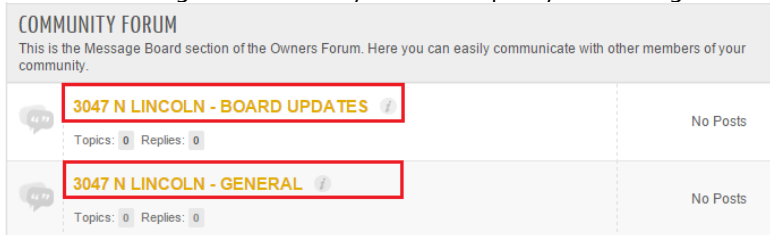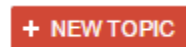
CREATING A NEW TOPIC

To begin a conversation or share an update, a user will post a new "topic" under the message board that most closely represents the topic of their message. (There are two (2) message boards available)

1) Click the message board where you'd like to post your message.

COMMUNITY FORUM
This is the Message Board section of the Owners Forum. Here you can easily communicate with other members of your community.

3047 N LINCOLN - BOARD UPDATES ⓘ
Topics: 0 Replies: 0   No Posts

3047 N LINCOLN - GENERAL ⓘ
Topics: 0 Replies: 0   No Posts

2) Click the **NEW TOPIC** button.

+ NEW TOPIC

3) Create your message just like typing an email in your favorite email editor. The system uses full HTML messages and allows for one or more attachments to be added to your post. (See sample screenshot below)

NEW TOPIC

Subject | My New Message

Topic icon | 📄 ⚠️ ❓ 💡 ❤️ 📑 ❌ ✔️

Boardcode | B I U S X₂ X² Tr ⊞ | ☰ ☰ ☰ ☰ ☰ ☰ | 💬 📁 🖼 🎨 | 🖼 📷 | 🖼 | ❓
😀😀😀😀😀😀😀😀😀😀😀😀😀😀😀😀😀😀😀😀😀😀😀😀😀😀
Ordered List: [ol] [li]text[/li] [/ol] - Tip: a list must contain List Items

Message
Enlarge / Shrink | Hello Fellow Owners!

This is my first message!

Attachments | 1. _____ Add File

Subscribe | ☑ *Check this box to be notified of replies to this topic.*

Submit Preview Cancel

Graphic 4.4: Submitting a new topic

4) **Important**: Keep in mind that you are logged into the *Owners Forum* using your Association's shared account. Due to this you should always provide your name and unit number in any messages that you add to the system. If you fail to add your name to a post, the message will essentially be posted anonymously.

5) Click the **Submit** button to post your message to the forum.

Submit

REPLY TO AN EXISTING TOPIC

Similar to email, you can reply to an existing topic to provide your comments or feedback to the community. Your comments will then be recorded and appended to the existing record. Users can view the ongoing string of comments between users as the conversation progresses.

While viewing a topic simply click the **Reply** button to take part in the conversation. (See screenshot below)

Graphic 4.5: Reply button

Important: Keep in mind that you are logged into the Owners Forum using your Association's shared account. Due to this you should always provide your name and unit number in any messages that you add to the system. If you fail to add your name to a reply, the message will essentially be posted anonymously.

NOTIFICATION OF A NEW TOPIC

The *Owners Forum* will send owners within your Association a notification via email when a new topic has been posted to a board. This feature will ensure that you are made aware of all conversations without being required to check the site on a regular basis.

The email list used by the system to send updates was provided by your Board of Directors during the sign-up process. To add, change or remove your email from the system list please refer to the instructions found in a later section of this document, named "MESSAGE BOARDS EMAIL LIST".

SEARCHING THE MESSAGE BOARDS

Along with browsing topics you can use the search feature to quickly find topics of interest. The search tool is available in the top forum menu.

To initiate a search simply type in one or more search terms and the system will return all topics matching your search criteria.

ADVANCED SEARCH

Search by Keyword

Keywords:

[   ]

Search entire posts ▼

SEARCH OPTIONS

Find Posts from

A year ago ▼

And newer ▼

Sort Results by

Posting date ▼
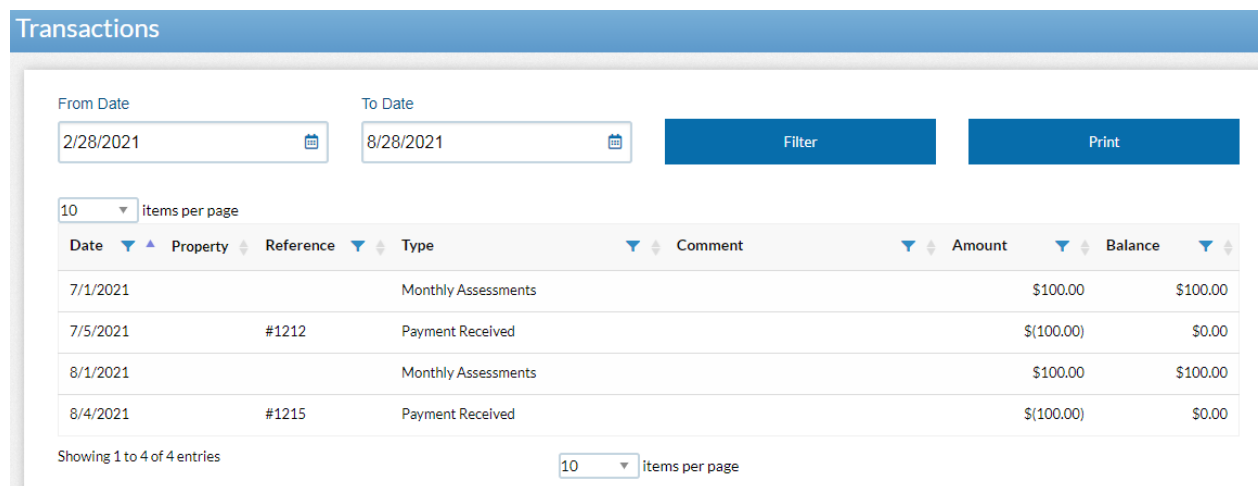
Decreasing order ▼

Jump to Result Number

0   Show 15 Search Results ▼

RESOURCE 4: MY ACCOUNT PORTAL 🔒

One of the most commonly used resources within the *Owners Forum* is the *My Account Portal*. This allows owners to manage their personal association account; similar to online banking. With this resource you will be able to:

1) View your personal ledger including all charges and payments on your account.

2) Make one-time ePayments from your checking account towards your association account (Credit cards payments are not accepted at this time)

3) Setup recurring auto-ePayments to pay your assessment automatically from your checking account each month. (Credit cards payments are not accepted at this time)

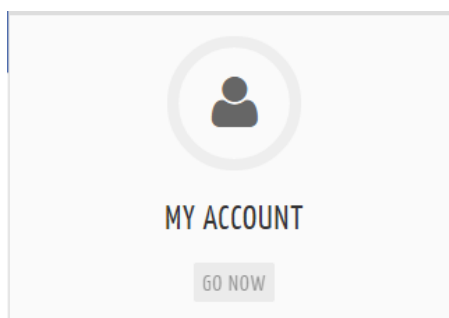4) Update your preferred contact information within the Connected systems.

Graphic 5: Sample ledger within the My Account system

ACCESSING THE 'MY ACCOUNT' RESOURCE

After logging into the *Owners Forum* click the **MY ACCOUNT** option from the main page. (See sample below)

ALTERNATE METHOD OF ACCESS

The *My Account Portal* can be accessed outside of the *Owners Forum* by typing the following address into your web browser: http://www.connectedepay.com/

ADDITIONAL USER ACCOUNT REQUIRED 🔒

The *My Account Portal* is the only resource within the *Owners Forum* that utilizes its own, separate list of user accounts to control access. Since this tool provides confidential details about your individual association account, you must obtain a separate username and password from Connected in order to access this resource. The shared username and password that you use to access the *Owners Forum* **will not** provide access to the *My Account Portal*.

REGISTERING – REQUESTING AN ACCOUNT

In order to use the ***My Account Portal*** you must have an active user account with a valid username and password. You can create a new account using one of two methods:

1. **Option1: Self-Create Account** - By clicking the "Sign up" link on the Log-in page, you can register a new account within the system. In order to utilize this option you must enter the following two pieces of personal information:

   - **Email Address** - This must exactly match the email address on file with Connected Management.
   - **Account Number** - Each resident has a unique account number within the management systems at Connected.

Graphic: Click the "Sign up" link to initiate the process of setting up a new account.

CONNECTED MANAGEMENT WEB

ACCESS

Profile Information

Email Address

someone@company.com

First Name
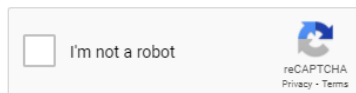
Last Name

Phone Number

(___)___-____

Account Validation

Enter the following to verify your personal information and connect this account.

Account #

I'm not a robot

reCAPTCHA
Privacy - Terms

Sign Up   Cancel

Graphic: You must provide your Email address and Account # in order to complete the setup of your new account. (These values must match those in our management systems.)

Your account number and email address were detailed in your welcome packet. The account number is also detailed on most notices that you will receive from Connected. You can also obtain this information from a staff member at Connected Management. Please email support@connectedmanagement.com or call (773) 913 - 2569 x 1 to request your account number and/or verify the email address that we have on file for your account.

2. **Option 2: Created by Connected** - A member of our support staff can create a user account on your behalf. Please call our support team at (773) 913 - 2569 x 1 and ask for your *My Account Portal* user account to be created.

RECOVERING A LOST PASSWORD

To recover a forgotten password, complete these steps:

1) Click the **Forgot Password?** link from the Log-in page. (See sample below)

2) The system will send recovery instructions to the email address associated with your account.

 Important The recovery email will be sent by "RWA Email Verification" with a reply email address of donotreply@rentmanager.com. *Rent Manager* is the software provider of the management system we utilize at Connected Management.

If you do not receive an email in your inbox within 10 minutes please check your spam/junk folder and any filters you may have set. You must allow emails from "rentmanager.com".

CHANGING YOUR PASSWORD

You can change your password using the **User Profile** menu option. Perform the following steps: (you must be signed-in to the *My Account Portal*)

1) From the top-right corner of the screen, click your account name, then User Profile.
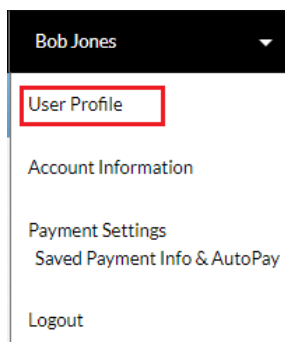
2) Click the **Change Password** button.

3) Complete the "Change Password" form. Click the **Change Password** button to record your changes.

MANAGING YOUR ACCOUNT

Once you have logged in, you will see a snapshot of your account on the **Dashboard** tab as shown below.

Graphic: The ***Dashboard*** *tab provides a general overview of your account.*

From the Home page you can use the menu at the top of the screen to perform the following functions:

1) Click **Charges** to view all unpaid (open) charges on your account.

2) Click **Transactions** to view all charges and payments on your account.

3) Clicking **Make a Payment** allows you to make one-time ePayments using your checking or savings account. You can also configure "AutoPay" so that your payments are made automatically on a schedule of your choosing.

Make a Payment

4) Clicking **Payment Settings** allows you to configure, review and manage your payment information along with any Automatic Payments that you have configured.

Bob Jones ▼

User Profile

Account Information

Payment Settings
 Saved Payment Info & AutoPay

Logout
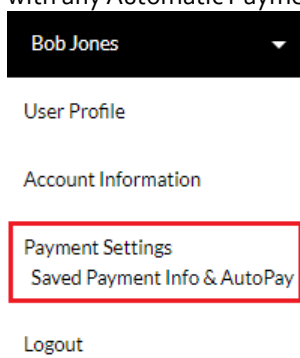
MAKING ONE-TIME EPAYMENTS

You can make one-time ePayments from your checking or savings account using the **Make a Payment** option from the top menu. A $.99 convenience fee will apply for each payment made.

Make a Payment

CONFIGURING RECURRING "AUTO" EPAYMENTS

You can configure "AutoPay" so that your payments are made automatically on a schedule of your choosing. Click the **Payment Settings** menu to configure, review and manage your payment information and Automatic Payments. A $.99 convenience fee will apply for each payment made.

Bob Jones ▼

User Profile

Account Information

Payment Settings
  Saved Payment Info & AutoPay

Logout
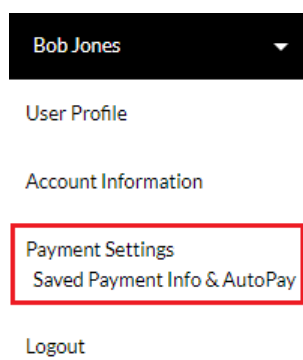
UPDATING A PAYMENT ACCOUNT

Click the **Payment Settings** menu to configure, update, review and manage your payment information along with any Automatic Payments that you have configured.
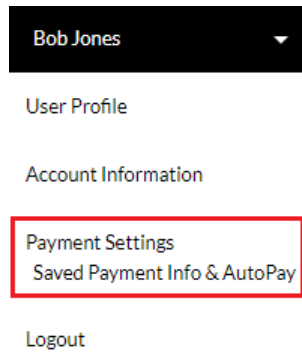
RESOURCE 5: REIMBURSEMENT REQUEST SYSTEM

Connected's Reimbursement Request System is a convenient and efficient way for board members or unit owners that have purchased items, or otherwise spent personal funds on behalf of the association, to be quickly re-paid.

Owners will complete a short questionnaire as well as scan and attach all related receipt(s). The submission is handled by our finance team who will contact your manager for approval to mail a reimbursement payment. The board, in turn, will be asked for final approval prior to the issuing of any reimbursements.

Note: Reimbursement checks are normally mailed within 48 business hours after receiving approval from your Board of Directors.

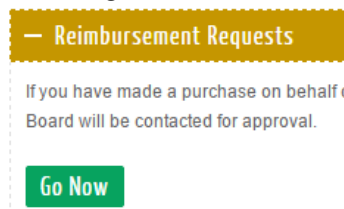Complete the following steps to submit a reimbursement request:

1) After logging into the *Owners Forum* click the "Resident Resources" option from the main page. (See sample below)

    Resident Resources   User's Manual

2) On the resulting page, click the + icon next to the **Reimbursement Requests** accordion.

    + Reimbursement Requests

3) Click the green **Go Now** button.

    — Reimbursement Requests

    If you have made a purchase on behalf
    Board will be contacted for approval.

    Go Now

4) Complete the form. You must upload copies of your receipts (required) to the form.

5) Click the **Submit** button to complete your request.

    Submit

RESOURCE 6: MESSAGE BOARDS EMAIL LIST

We maintain a "Message Boards" email list, containing the email addresses of all unit owners. This email list is used by the *Owners Forum* to send notifications to all owners when a new topic has been posted to a message board.

The email list for your Association is initially created using the email addresses provided by your Board of Directors during the sign-up process. Due to this, the email address associated with your unit may not be accurate.

To add, change or remove your email from the system list, you will need to complete a short form. A member of our team will then update your Association's email list accordingly. Complete the following steps to submit a request for a change: (add, modify, delete)
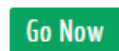
1) After logging into the *Owners Forum* click the "Resident Resources" option from the main page. (See sample below)

2) On the resulting page, click the + icon next to the **Update "Message Boards" Email List** accordion.

3) Click the green **Go Now** button

4) Follow the instructions on the form and complete all fields.
5) Click the **Submit** button to complete the process