

Owner's Portal Overview for Board Members

As a Board member, you will have access to additional pages when you log into the Owners Portal provided to you by Prospect Management. These additional pages are only available to Board Members and will not be visible to non-board member homeowners. This is an overview of those additional pages on the portal for Board Members.

Begin by logging into the Owners Portal. Once you log in, you'll notice at the bottom left you have a Board section. These are the specific pages that you as Board member will have access to.

Welcome Snow-way Jose!

Owner

- Dashboard
- My Account
- Make a Payment
- My Items
- My Contact Info
- My Login
- ARC Request
- Submit a Request

Association

- Calendar & Events
- Directory
- Documents

Board

- Board Action Items
- Homeowners
- Collections
- Violations
- Work Orders

UTOPIA HOA

Owner Dashboard

For more information or to contact your Advisory Board, [click here!](#)

Account Information - Balance: \$29,226.45

Upcoming Assessments

Testing Percentage Import \$56.00 on 06/01/2018 Special Assessment \$101.00 on 07/01/2018 Special Assess \$50.00 on 08/15/2018 Quarterly Assessment \$23,000.00 on 09/01/2018 for 625 Ocean View Circle

[View Account...](#)

Recurring Payments

Recurring Payments
No scheduled payments.

[View Recurring Payments...](#)

Open Issues - 29

PAYMENTS **REQUESTS** **DOCS**

Reviewing the Dashboard, you'll notice at the top left it will show your name (so you know you're logged in correctly). In the center of the dashboard your current Account Information is displayed by default, showing any upcoming assessments and any open issues you may have. Below, you'll notice a few

orange icons. These icons are hotlinks to some of the tabs on the left side of the portal. Clicking any of these icons will bring you to that corresponding page. On the left, there is a panel containing three sections: Owner, Association and Board. The Owner and Association sections will show on all homeowners' portals. The Board section will only show on Board Members' portals.

The Owner section allows you to view your account balance and ledger, make a payment, change or update your contact information, select whether or not your information is viewable in the community directory, change your password and submit various types of requests.

The Association section allows homeowners to view the association calendar and see upcoming events, view an owners directory (owners can choose to opt in or out of the directory) and view and download association documents or forms.

The Board section, which only Association Board members will have access to, displays various pages that can be used to manage their association:

Board Action Items: When you click on Board Action Items, you will see any Action Items or Association Tasks that are currently assigned to you. Based on the type of Action Item, a Board member will be able to approve or decline or Msg (message) on these tasks from the orange menu box on the far right. The Action Item can always be viewed in more detail by clicking the drop down arrow on the left.

	XN	Item Details	Attach
▶	2089974	Association Task / Tabled Follow Up null Due Date null Utopia HOA Paving Project	
▶	3519110	CCR Violation / Warning Letter Follow Up null Due Date null Lot Maintenance - Utopia HOA Bob Nanna	

Homeowners: The homeowners page is a searchable directory of all owners that can be easily exported to Excel for reporting or documenting by clicking on the Export to Excel button. The directory can be filtered by any column by clicking the 3 dots in the column header. You can also ascend or descend columns, adjust search values, or add or remove columns. To see previous owners, check the Previous Owners Only box. To view an owners open Action Items, Charge Balances or Transaction History, click on the drop down arrow next to a specific homeowner record. Click the Show Owners button again to refresh your Homeowners List.

Board Homeowner List

Utopia HOA

Show Owners Previous Owners Only Owner Tags... Export to Excel

Account #	Homeowner	Address	Email	Balance
▶ 99991224	ARC Hero		maarten@vantaca.com	\$4,626.45
▶ 99991221	Anna	M: 749 Dahlia Rd	kayteejoy@yahoo.com	\$4,438.45
▶ 99991233	Test Board Role	P: 98 test M: 98 test	maarten@vantaca.com	\$4,418.45
▶ 99991231	Estate of Shelly Ann DeAntonio	P: 617 Trails End Rd M: 123 Fulsom Ln	sdeantonio@csmtgroup.com, bdsnow@vantaca.com	\$5,711.62

Collections, Violations, Work Orders and Invoices: These pages show all open Action Items of these types, and can also be used to research previously closed Action Items of that type. Specific and more detailed instructions for each of these sections can be found on the Vantaca Guides page of our website.

Board Homeowner List

Show Owners Previous Owners Only Owner Tags... Export to Excel

Account #	Homeowner	Address	Email	Balance
▶ 99991224	ARC Hero	P: 45 Frank Road M: 45 Frank Road	maarten@vantaca.com	\$4,626.45
▶ 99991221	Anna	P: 749 Dahlia Rd M: 749 Dahlia Rd	kayteejoy@yahoo.com	\$4,438.45
▶ 99991233	Test Board Role	P: 98 test M: 98 test	maarten@vantaca.com	\$4,418.45
▶ 99991231	Estate of Shelly Ann DeAntonio	P: 617 Trails End Rd M: 123 Fulsom Ln	sdeantonio@csmtgroup.com, bdsnow@vantaca.com	\$5,711.62
▶ 99991239	Yancy	P: 5 Privet Drive M: 5 Privet Drive	yancy@camsmgt.com	\$4,378.45