



## **Board Member Account Access**

---

2020 Version

## Table of Contents

Congratulations! As a board member, you now get special privileges when creating an account on our online portal! This document

Page 2	Setup New Account
Page 7	Login to Existing Account
Page 8	Summary of Features

## **To Setup a New Account:**

Step 1: Visit your communities website.

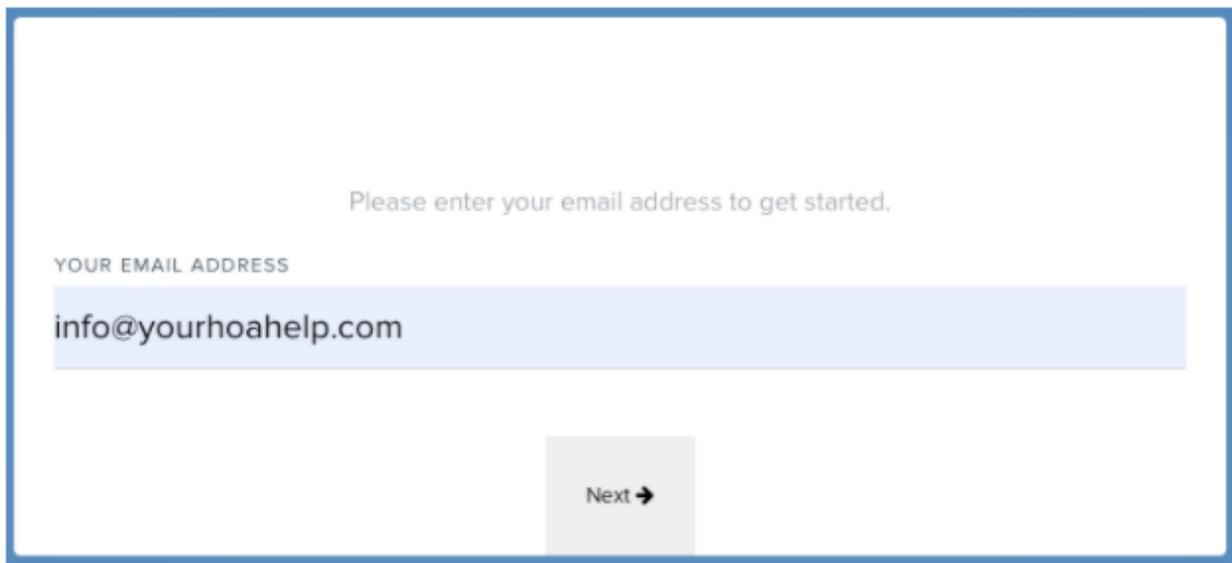
Step 2: Navigate to the “Account” Page.

Welcome! • Community Information • **Account** • Contact Us

Step 3: Click on the “Create a New Account” button.



Step 4: Enter your Email Address and hit “Next”. *(be advised that this is the email address that you will login with and that we will use to send you updates from the portal)*



Please enter your email address to get started.

YOUR EMAIL ADDRESS

info@yourhoahelp.com

Next →

**Step 5: Fill in your information.** *Note: It is always important to check to make sure that the association name listed is the association you belong to.*

## Join your HOA

Please provide your info and our team will get you added to your HOA

**YOUR HOA NAME**

Sample Homeowners Association, Inc.

---

**YOUR NAME** **EMAIL ADDRESS\***

Bob Sample info@yourhoahelp.com

---

**UNIT ADDRESS\***

1511 Sample Street

---

<b>CITY*</b>	<b>STATE*</b>	<b>ZIP*</b>
Greenfield	Indiana	46140

---

**JOIN!**

Step 6: Check the email that you signed up with for a “Registration Email”.

Step 7: Click the “Setup My Account” button.





**YOUR HOA**  
**Sample, HOA**

Sample Homeowners Association, Inc.

---

MEMBER NAME <b>Sample, HOA</b>	ACCOUNT NUMBER <b>4690-260306</b>
MEMBER EMAIL <a href="mailto:info@yourhoahelp.com">info@yourhoahelp.com</a>	

Step 8: Fill in all of your account information including a password.  
Note: this password is not shared with anyone from our team.

Welcome to PayHOA

---

You have been invited to join PayHOA to help you manage your finances and pay your fees/dues as member of Brianwood Trace HOA c/o Your HOA .  
Please provide the following member information to finish setting up your account.

---

**Member Information**

First Name

Last Name

Confirm Email Address  
  
Email address must match the one your activation email was sent to.

Phone

---

**Create Password**

Confirm Password

---

**Current Address**

Address

Address 2 (optional)

City

State/Province

Zip

Select "Save Account Details".

## **To Login to an Existing Account:**

Step 1: Visit your communities website.

Welcome! • Community Information • **Account** • Contact Us

Step 2: Navigate to the “Account” Page.

Step 3: Click on the “Login to Existing Account” button.



Step 4: Enter your Email Address and Password then select “LOGIN”.

## Summary of Portal Features:

There are many great features to the portal that you as a board member can take advantage of. Below is a quick summary.



This is where you can see a summary of **your own account**. This includes Outstanding Invoices, Account History, Payment History, Documents, Arch Requests and more.



This is where you can look up all the "units" (homes) within your community. For each Unit you can view the same info that you can see on your own account. Clicking this will also show you a quick reference to the right of open violations notated by a "yes" under violations.



This section is used to search Homeowners (including rental companies) in the online system. It will also show you the contact information (if any exists) including mailing address, email and phone number. Another great feature is that it shows you the last login for each homeowner.

 **Invoices**

Use this link to view all invoices or search for certain invoices within the online system.

 **Payments**

The payments link will let you view any payments received through the online portal, or by check in the office.

 **Bill Pay**

the bill pay link allows you to view the vendors for your community and the payments that have been made to them. We also upload the copies of the invoices weekly so you can view the paid invoice as well.

 **Budgets**

Budgets is where you can view your budget vs actual reports for the community. You are able to choose a time period for this report giving you unlimited options on what to view.



## Communication

Communication allows you to view all communications to your community that have been sent through the portal. This includes Violations, Arch Requests, Emails Blasts and more.



## Reports

This is by far the most useful tool to board members. You are able to run reports at anytime for your community. These include, but are not limited to Profit and Loss, Balance Sheet, Aging of Accounts, Delinquencies, Vendor Payments, A Community Directory, and More.



## Calendar

This is a public community calendar. Homeowners and Board members can view this calendar which can include events within the community, meeting dates and more.

*Thank you for taking the time to review this document. As always, we know you are going to have questions and we are ready to help.*

*If your board would like to schedule a Live Training on the Portal we are happy to do so, just let us know and we will get it set up. These trainings can be via Zoom or in person at our corporate office.*

*Thank you and we look forward to having the portal be the tool you can't live without!*

*- The Your HOA Management Team*