



*Community Web
Portals – A Seminar for
Board Members*



Imagineers provides each client with a Community Web Portal as part of our basic management services. The community web portal provides all homeowners with the ability to login and directly access in real time, their account balance, account history, rules infraction history and status of work orders. It also provides many features and tools that can help boards to more conveniently meet their responsibilities and for homeowners to be better informed.

Thank you for joining us this evening to learn how your community's web portal can be reliable and efficiently tool to communicate, educate, share, and inform members of your community.

Other Imagineers Website Features

- **Newsletter/Resource Web Page** – The Imagineers website now has a “newsletter / resource” web page to post helpful community association information and tools. Currently we have posted the Imagineers created document “Welcome to the Board” informational booklet for new board members (as well as those experienced board of directors interested in a refresher). We also have posted recently published articles from the CAI magazine Common Interest manager’s column written by our own Imagineers property manager, Jim Banno. We will continue to add to this page.
- **Online Service Request Capability** - The ability for homeowners to make online queries for accounting and service requests issues.
- **Online Resale Request Forms** - We have a resale request form that can be accessed and printed directly from the web site. We also have plans this year to explore offering directly access to closing data information through an online service.

How to Best Utilize this New Free Feature as a Beneficial Tool for Your Community

- Differences between Web Portal and Website
- Safe Secure Login Access
- How to Login
- Community Home Page Options
- Posting Announcements
- Utilizing Events / Calendars
- Posting Forms, Policies and Procedures
- Linking to existing Association website & other online service requests

Differences between Web Portal and Website

Intranet Web Portal for your Community - Imagineers now offers an intranet web portal for your community through our website. A community intranet web portal operates like a community website but has access restricted to limited groups of authorized users. Each homeowner obtains his/her own secure password and logon to access community information as well as homeowner specific information.

Safe Secure Login Access

Privacy is assured as access is restricted to authorized users and each unit owner is required to create his/her own user name/password to log on. To access the site, the owner will need their account number which can be found at the top of their coupon book. If they have direct debit from your bank and/or don't know your account number, the owner can contact our management staff to obtain their account number.

How to Login

With your account number handy, access our website at www.imagineersllc.com .

Click on the 'Condominium Management' tab on top of page

Click on 'login to my Community' on left side of page

Click on 'obtain initial logon information'. At the prompt enter your account number, name and email address. An email will be sent to you within seconds containing a website link. Click on that link (or copy/paste) and you will be asked to create your own user name and password. Upon entering this information, you will be connected directly to the community homepage from which you can access any of the above listed pages and more.

If you should encounter any problems logging in or have any additional questions, please contact our office.

Association Homepages at www.imagineersllc.com



The **Account Info** portion of the homepage provides each owner with real-time account balance information. By clicking on the "View Account Detail" button, owners can access a 24 month detailed account history for their individual member account. Displayed in the account history is every transaction applied to their account during the 24 month period along with a running account balance. Information is also available regarding service requests, violations & variances pertaining to their home.

Each Imagineers' client community has its own homepage on the Imagineers website. Homeowners access the homepages through a password protected login.

The **Documents** section of the homepage can be set up with multiple folders containing documents that are of use to owners. Homeowners could have ready access to community forms, policies, procedures. An Association may wish to have a folder for Budgets. The folder could contain copies of past, current and proposed budgets. Communities may have the practice of mailing approved meeting minutes to homeowners. Instead of incurring the mailing and photocopy costs, the minutes may be posted on the community homepage. Maybe your community would like to have a folder to give owners access to past newsletters and community notices.

Announcements can be posted to assist in improving the communication with the community owners without the need to incur postage and photocopy fees. Announcements can be entered so that owners are required to acknowledge reading the message before being allowed to fully access the homepage. Each acknowledgement is then documented for future reference.

The **Events** portion of the homepage gives the Association the ability to post upcoming events. Details of the events may be included to advise the owners not only of the date but other information such as time, location, parameters, and associated document attachments. Events could include open board meetings, annual meetings, pool opening & closing, street sweeping, reminders to change smoke detector batteries, etc.

The community & Imagineers can offer useful website links in the **Links** portion of the homepage. Included are links back to the Imagineers' website to provide the opportunity for owners to place a service request or for owners to ask a question related to their account. Communities may wish to have a link to an existing Association website.

635 Farmington Avenue - Hartford, Connecticut 06105
249 West Street - Seymour, Connecticut 06483

Why should my Community want to utilize its community web portal?

It provides a method to centrally store important community documents in an organized and accessible manner available to all homeowners at any time. Some examples include:

- Board Meeting Minutes
- Newsletters
- Community Rules and Regulations
- Policies (e.g. Late Fee Policy; Snow Removal Policy)
- Welcome to Community Information
- Variance Request Forms and Guidelines

Homeowners access in real time their common fee account information

It provides a convenient method for all homeowners to directly access in real time their common fee account balance and account history (this is pulled directly from the Imagineers accounting system). It can provide access also to work order request and covenants. It also provides an online method to place a service request or request response to an account inquiry. Some examples include:

- Quick answers to billing question or account history
- Status of work order request
- Access to historical records of covenants.
- Online method to place service requests
- Online method to request Imagineers accounting support

Announcements to homeowners

It provides an additional convenient method to make community announcements to homeowners. Some examples include:

- Announcement of a change of a rule
- Announcement of a change in policy
- Announcement of an upcoming event
- Announcement of projects or activities impacting residents

Community Calendar

It provides a way to maintain a community calendar for community events accessible by all homeowners. Examples include:

- Social Events
- Annual meetings
- Board Meetings
- Minutes Posting
- Assessment Reminders
- Maintenance Reminders
- Insurance Policy Renewal Date

Website Links

It provides easy web links to other internet websites of interest.

Examples include:

- Connecticut Chapter of Community Association Institute
- Legislative matters impacting the community
- Resources important to the community
- Existing Association Website

And the best reason of all - It's Free

It is part of the standard services that we offer to all communities that we manage. Each community can utilize the features as much or a little as they wish. In general, it can help to conveniently foster greater communication on issues important to the community. Increased communication can help to avoid frustrated homeowners and help to prevent community discord.

Upcoming Sessions

- Getting the most out of your Financial Statements
- Insurance for Associations
- What other topics would interest your community?



*Thank you very much
for your attendance
tonight and for your
dedication to your
community.*