



Homeowner Portal User Guide

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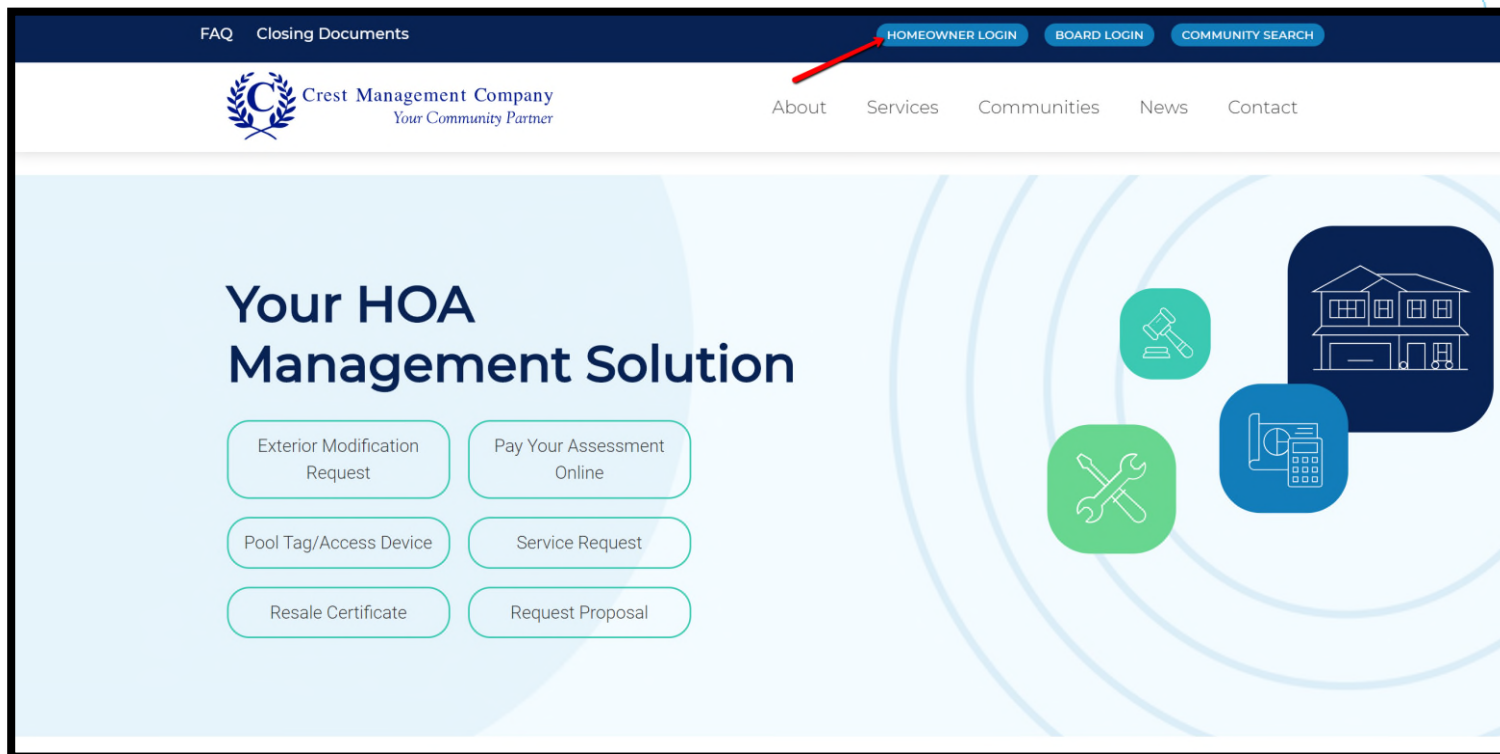
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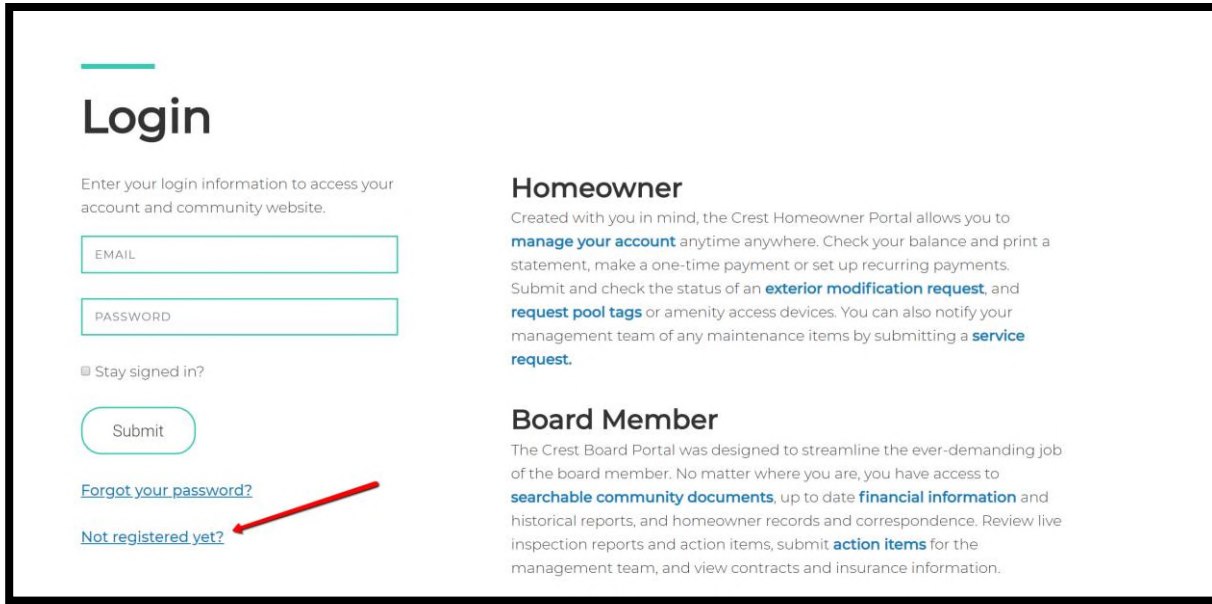
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- ▶ Go to www.crest-management.com and click on Homeowner Login.



▶ Click on Not Registered Yet?



Login

Enter your login information to access your account and community website.

EMAIL

PASSWORD

Stay signed in?

Submit

[Forgot your password?](#)

[Not registered yet?](#)

Homeowner

Created with you in mind, the Crest Homeowner Portal allows you to **manage your account** anytime anywhere. Check your balance and print a statement, make a one-time payment or set up recurring payments. Submit and check the status of an **exterior modification request**, and **request pool tags** or amenity access devices. You can also notify your management team of any maintenance items by submitting a **service request**.

Board Member

The Crest Board Portal was designed to streamline the ever-demanding job of the board member. No matter where you are, you have access to **searchable community documents**, up to date **financial information** and historical reports, and homeowner records and correspondence. Review live inspection reports and action items, submit **action items** for the management team, and view contracts and insurance information.

- ▶ Select whether you are a Homeowner or Title Company
- ▶ Click Continue.

Temporary Password Request Form

Who is registering?

- If you are requesting access to the Homeowner Portal or if you are the administrator for your Title Company, register here.
- If you are a board member requiring board portal access, please contact your manager.
- If you are an employee of a Title Company or your company is already registered, please contact your admin for access.

Homeowner

Title Company

- ▶ Enter your first and last name.
- ▶ Enter your email.
- ▶ Search for your address by typing only the number and street name. A list of matching options will appear. Select your address from the list rather than continuing to type.

Account Information

ENTER FIRST & LAST NAME

ENTER EMAIL

Search for your address:

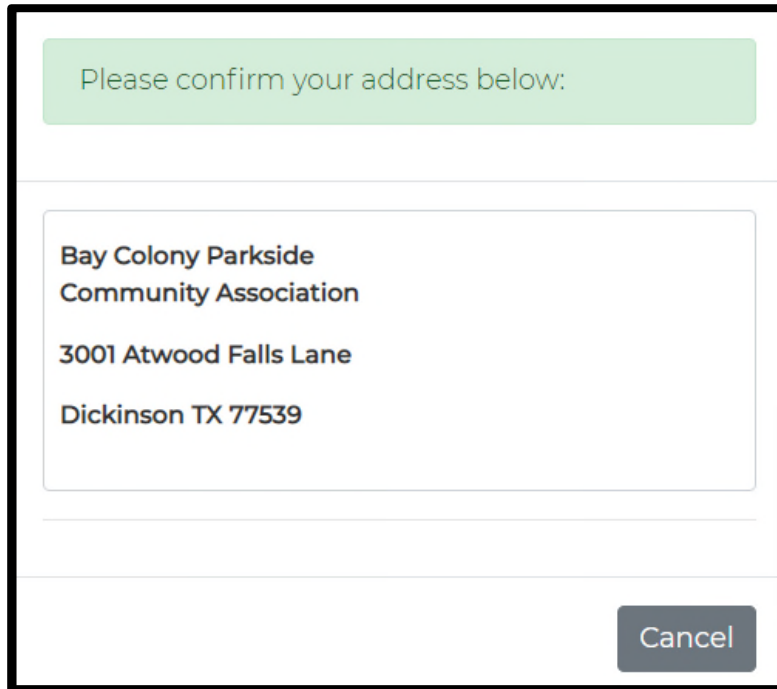
Example: "17171 Park"

Please note to only type the beginning of your street address - city and state are not necessary.

For example: "17171 Park"

Search Address

- ▶ Click on your address to proceed. If your address is not shown, click Cancel to go back.



A screenshot of a web interface showing an address confirmation dialog. At the top, a light green box contains the text "Please confirm your address below:". Below this is a white box with a thin border containing the address: "Bay Colony Parkside", "Community Association", "3001 Atwood Falls Lane", and "Dickinson TX 77539". At the bottom right of the dialog is a grey button labeled "Cancel".

- ▶ If you own more than one home, you can continue to search for the addresses one by one and add them to the registration.

- ▶ Select whether you are an Owner or Tenant.
- ▶ Select whether you want to receive your temporary password by email or mail. *To receive it by email, you are required to upload two proof of residency documents including a state-issued photo ID and an additional document listing your name and property address (closing document, utility bill, etc.). You are not required to submit documentation if you select to receive it by mail.*

3001 Atwood Falls Lane Registration

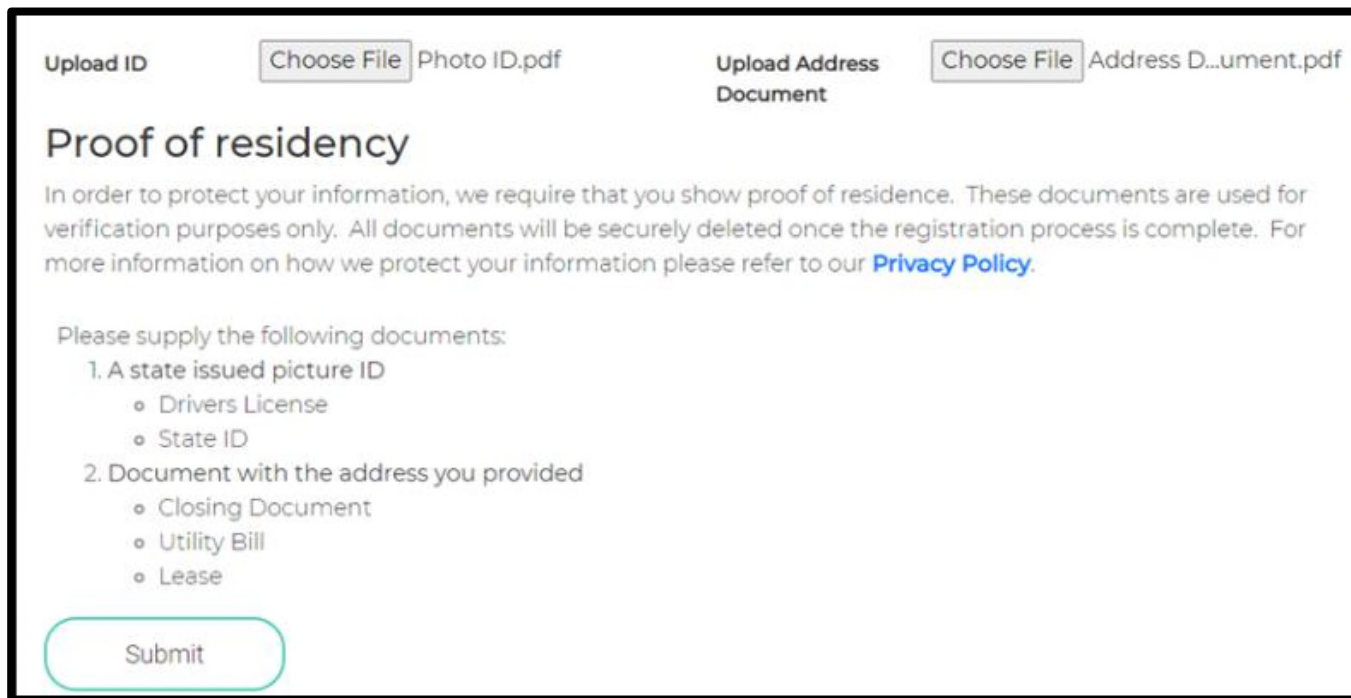
Bay Colony Parkside Community Association
3001 Atwood Falls Lane
Dickinson, 77539

* Owner
 * Tenant

Temporary Password Delivery Method
If you do not want to submit proof of residency, please select mail.

Email Mail

- ▶ If you chose to receive your password by email, click Choose File to find and select your documents. Make sure to upload separate documents to the Upload ID and Upload Address Document fields.
- ▶ If you chose to receive your password by mail, the upload fields will not be present.
- ▶ Click Submit.



The screenshot shows a web form with two upload fields at the top. The first field is labeled 'Upload ID' and contains a 'Choose File' button followed by the text 'Photo ID.pdf'. The second field is labeled 'Upload Address Document' and contains a 'Choose File' button followed by the text 'Address D...ument.pdf'. Below these fields is a section titled 'Proof of residency'. The text in this section reads: 'In order to protect your information, we require that you show proof of residence. These documents are used for verification purposes only. All documents will be securely deleted once the registration process is complete. For more information on how we protect your information please refer to our [Privacy Policy](#).' Below this text, it says 'Please supply the following documents:' followed by a numbered list: '1. A state issued picture ID' with sub-items 'Drivers License' and 'State ID'; and '2. Document with the address you provided' with sub-items 'Closing Document', 'Utility Bill', and 'Lease'. At the bottom left of the form is a rounded rectangular 'Submit' button.

- ▶ You will see a confirmation message once your request has successfully been submitted. You will also receive a confirmation email. If you do not receive the email, notify your management team.

Thank you!

Your request has been submitted.

Your request for access has been received and if your submission has been approved you will receive your temporary password within 2 business days.
Please add the address Do_Not_Reply@crest-management.com to your safe sender list, to avoid any delays in receiving your documents.

Subject: **Your Temporary Password Request has been submitted**
To: **jsmith**
From: **do_not_reply@crest-management.com**
Received: **Wed Jul 22 2020 18:54:03 GMT-0500 (Central Daylight Time)**

Thank you!

Your request has been submitted.
Your request for access has been received and if your submission has been approved you will receive your temporary password within 2 business days.
Please add the address Do_Not_Reply@crest-management.com to your safe sender list, to avoid any delays in receiving your documents.

- ▶ Once your request has been processed, you will receive a temporary password by whichever method you selected.

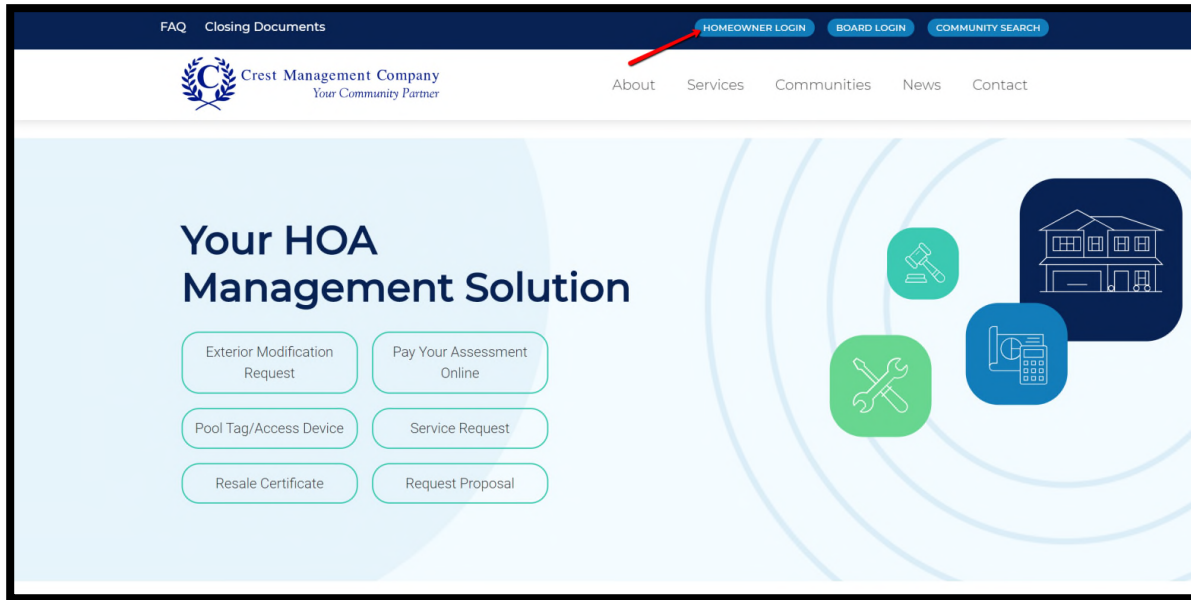
Subject: **Your Homeowner Portal Access Request has been processed**
To: **jsmith**
From: **do_not_reply@crest-management.com**
Received: **Thu Jul 23 2020 09:41:44 GMT-0500 (Central Daylight Time)**

Bay Colony Parkside Community Association

Your Homeowner Portal Access Request has been Approved. Please use the temporary password below to complete the registration process.

Temporary Password: TestPassword71

- ▶ Go to www.crest-management.com and click on Homeowner Login.



- ▶ Enter your email.
- ▶ Enter the temporary password you received.
- ▶ Click Submit.

Login

Enter your login information to access your account and community website.

EMAIL

PASSWORD

Stay signed in?

Submit

- ▶ Your name and address will be prefilled.
- ▶ Enter your phone number.
- ▶ Enter the password of your choice.
- ▶ Confirm the password by entering it again.

Register

Addresses

Bay Colony Parkside Community Association
3001 Atwood Falls Lane 108BV0302006

Account Information

Jane Smith

jsmith@mailinator.com

PHONE NUMBER

PASSWORD

CONFIRM PASSWORD

- ▶ Review the Terms and Conditions and check the box to acknowledge your acceptance.
- ▶ Click Register.

Terms and Conditions

Crest Management has created this Privacy Policy to inform those concerned with how their Personally identifiable information ("PII") is being used online. PII, as used in US privacy law and information security, is information that can be used on its own or with other information to identify, contact, or locate a single person, or to identify an individual in context. Please read this Privacy Policy carefully to get a clear understanding of how we collect, use, protect or otherwise handle your PII in accordance with our website. 1. HOW OUR PRIVACY POLICY WORKS Crest Management cares about your Privacy. Your personal data, content, subscriptions, interests, and clicks are all private. Advertisers are NOT partners and content is not mined for marketing purposes. We don't sell your information to mailing lists, third

I agree to the the terms and conditions

[Register](#)

- ▶ An advisory message will appear stating that as a final precaution, a verification link will be sent to your email.

Registration is Not Complete

Registration is not complete. You will be receiving an email shortly with a verification link. Please click the link to finish the registration process. If you do not receive the confirmation link in a few minutes, please check your junk and spam folders. Please add the address Do_Not_Reply@crest-management.com to your safe sender list, to avoid any delays in receiving our communications.

- ▶ Once you receive the verification email, click the link to confirm your email address.

Subject: **Welcome to Crest**
To: **jsmith**
From: **do_not_reply@crest-management.com**
Received: **Thu Jul 23 2020 11:05:17 GMT-0500 (Central Daylight Time)**

Thank you for signing up for our website! To complete your registration please click the link to confirm your email address. Your account will not be active until you click the link.

[Please Click to confirm your email address](#)

If you have any questions please feel free to contact us at 281-579-0761.

- ▶ Select your mailout choices.
- ▶ Enter the password you selected.
- ▶ Click Complete Registration.

We're almost done Jane Smith!

Please finalize the registration process by selecting your mailout choices and entering your password

Subscribed Notifications

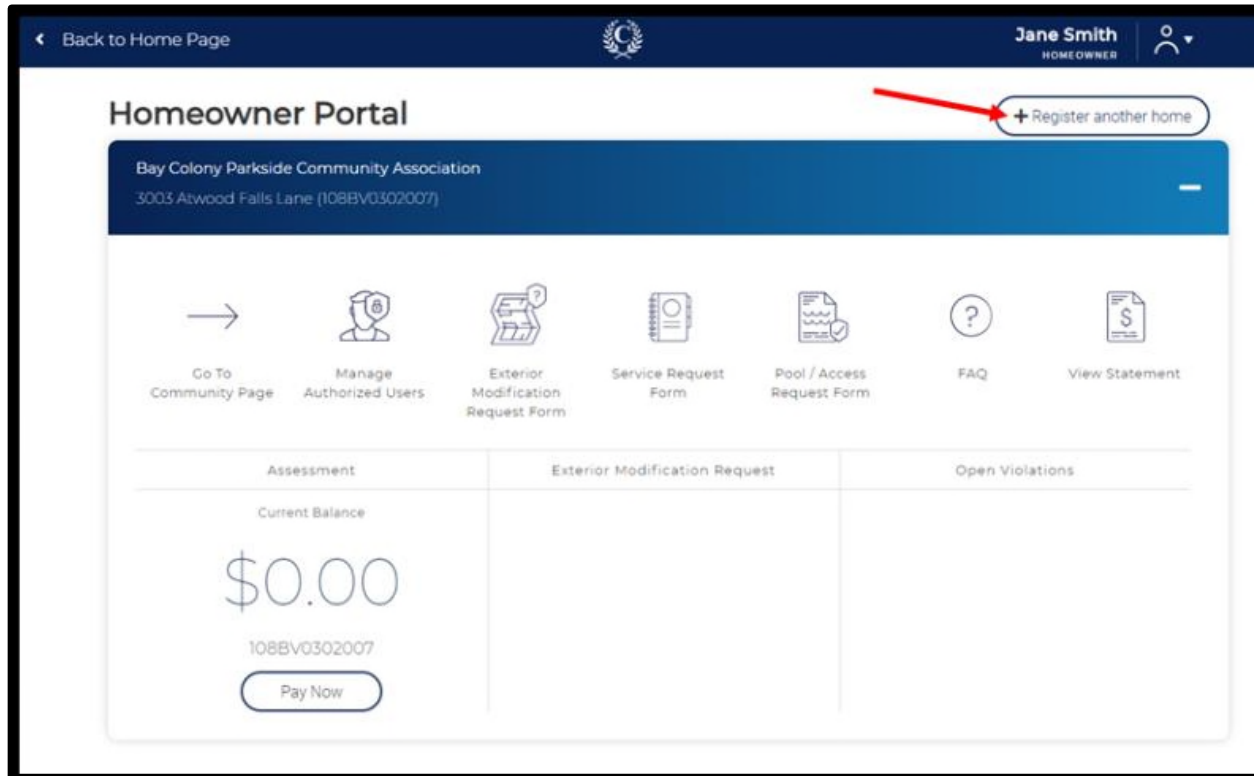
Bay Colony Parkside Community Association	Bay Colony Community Improvement Association
<input checked="" type="checkbox"/> Board Meeting	<input checked="" type="checkbox"/> Board Meeting

▶ Welcome to your Homeowner Dashboard!

The screenshot displays the Homeowner Portal interface. At the top, there is a navigation bar with a 'Back to Home Page' link, a community logo, the user's name 'Jane Smith HOME OWNER', and a profile icon. Below this is the 'Homeowner Portal' header with a '+ Register another home' button. The main content area is for the 'Bay Colony Parkside Community Association' at '3003 Atwood Falls Lane (108BV0302007)'. A row of seven icons provides quick access to: 'Go To Community Page', 'Manage Authorized Users', 'Exterior Modification Request Form', 'Service Request Form', 'Pool / Access Request Form', 'FAQ', and 'View Statement'. Below the icons is a table with three columns: 'Assessment', 'Exterior Modification Request', and 'Open Violations'. The 'Assessment' column shows a 'Current Balance' of '\$0.00' for property '108BV0302007' and includes a 'Pay Now' button.

Assessment	Exterior Modification Request	Open Violations
Current Balance \$0.00 108BV0302007 Pay Now		

- ▶ If you are a homeowner or investor that owns more than one home in Crest-managed communities, you may add all homes to the same registration.
- ▶ Log in to your account and from your dashboard, click Register Another Home.



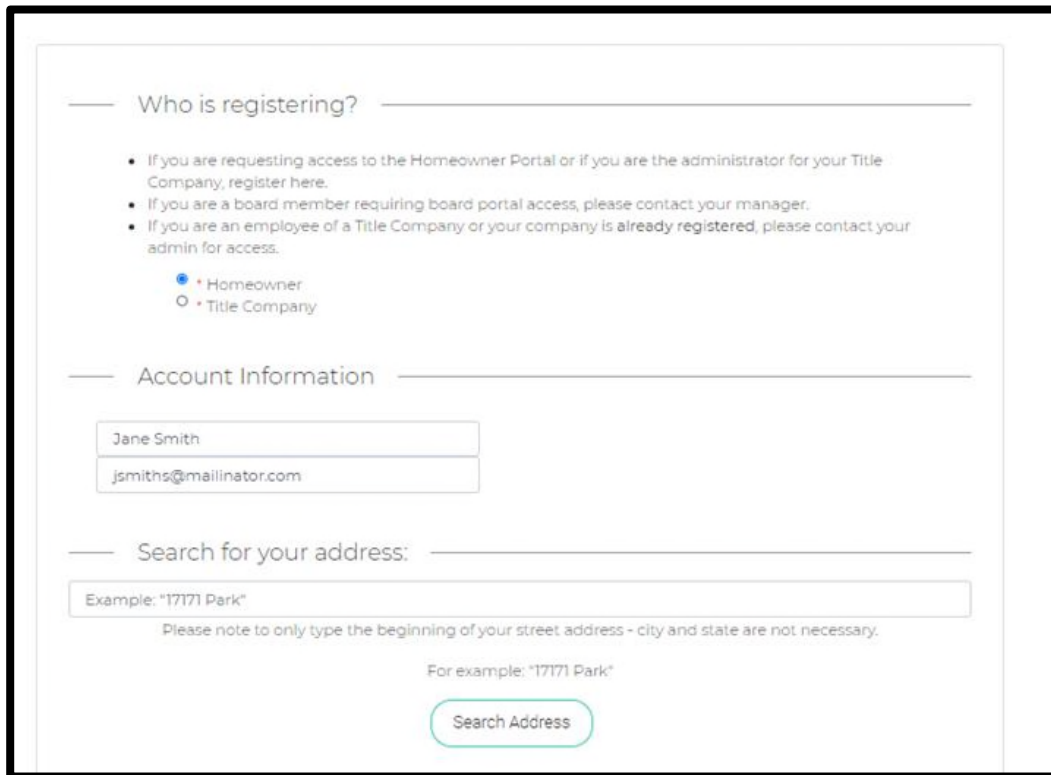
- ▶ Click the Temporary Password Request Form link.

Register Another Property

You can request a temporary password from the [Temporary Password Request Form](#).

Enter the temporary password you received to add the associated property to your account.

- ▶ Your name and email will be prefilled.
- ▶ Search for your address by typing only the number and street name. A list of matching options will appear. Select your address from the list rather than continuing to type.
- ▶ Click Search Address.



Who is registering?

- If you are requesting access to the Homeowner Portal or if you are the administrator for your Title Company, register here.
- If you are a board member requiring board portal access, please contact your manager.
- If you are an employee of a Title Company or your company is already registered, please contact your admin for access.

Homeowner
 Title Company

Account Information

Jane Smith
jsmiths@mailinator.com

Search for your address:

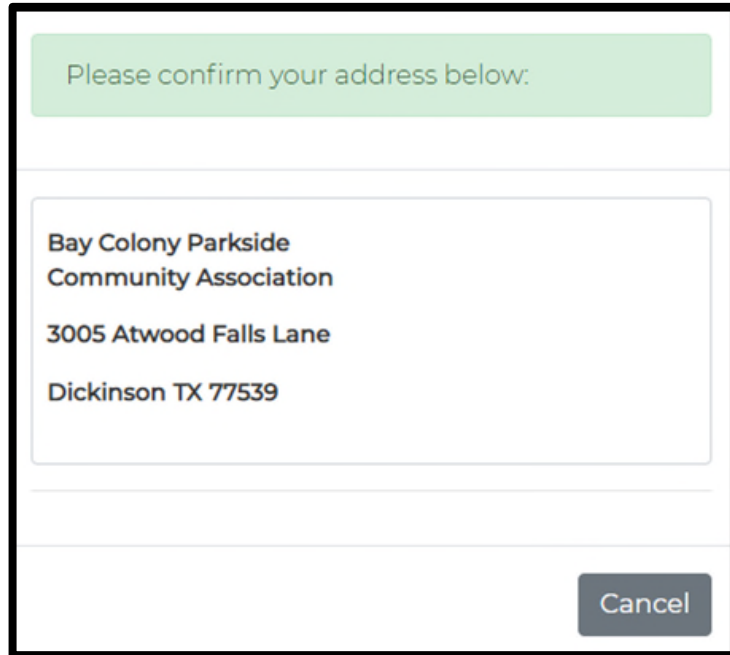
Example: "17171 Park"

Please note to only type the beginning of your street address - city and state are not necessary.

For example: "17171 Park"

Search Address

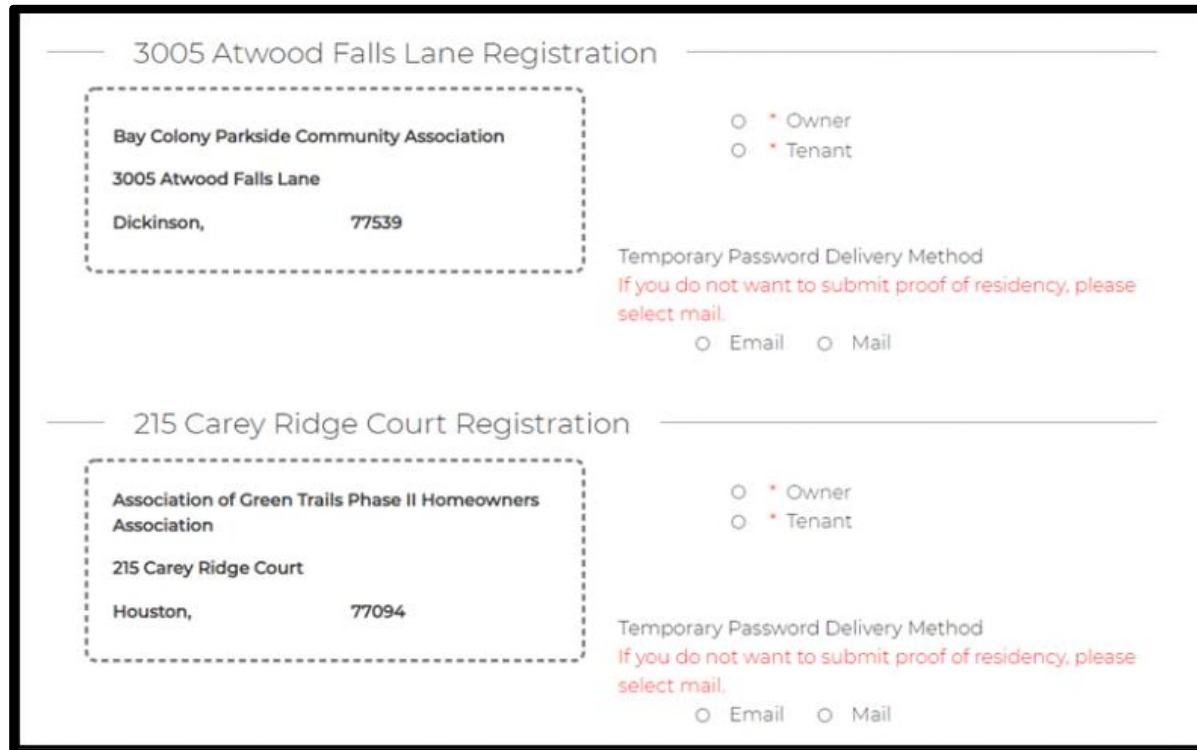
- ▶ Click on your address to proceed. If your address is not shown, click Cancel to go back.



A screenshot of a web interface showing a confirmation dialog box. At the top, a light green box contains the text "Please confirm your address below:". Below this is a white box with a thin border containing the address: "Bay Colony Parkside", "Community Association", "3005 Atwood Falls Lane", and "Dickinson TX 77539". At the bottom right of the dialog box is a grey button labeled "Cancel".

- ▶ The address will now appear below. The search bar will remain open and you can continue to add additional properties you own until complete.

- ▶ For each address, select whether you are the Owner or Tenant.
- ▶ For each address, select whether you want to receive the temporary password by email or mail.
- ▶ If you chose email, upload the verification documents.
- ▶ Click Submit.



3005 Atwood Falls Lane Registration

Bay Colony Parkside Community Association
3005 Atwood Falls Lane
Dickinson, 77539

* Owner
 * Tenant

Temporary Password Delivery Method
If you do not want to submit proof of residency, please select mail.
 Email Mail

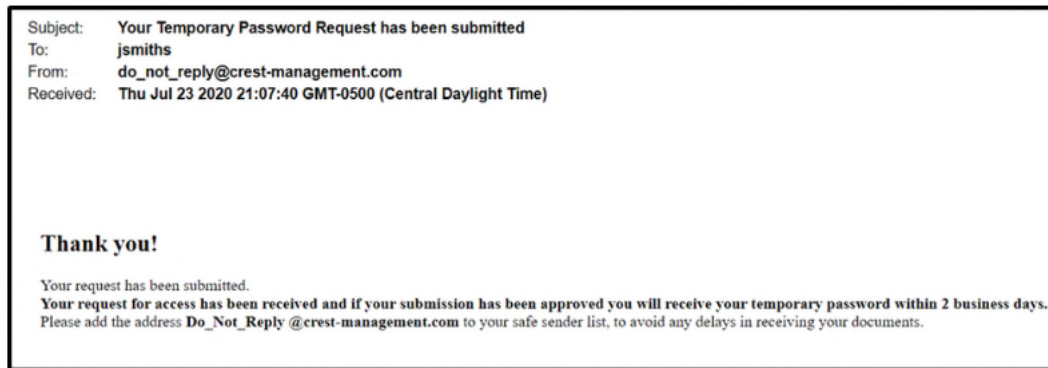
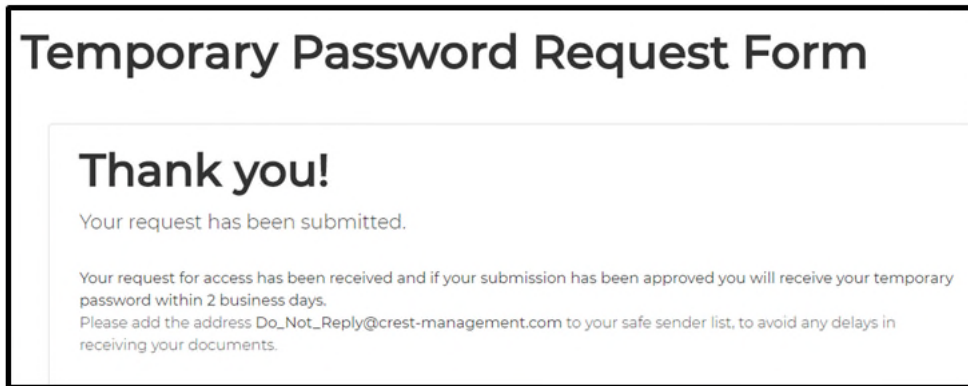
215 Carey Ridge Court Registration

Association of Green Trails Phase II Homeowners Association
215 Carey Ridge Court
Houston, 77094

* Owner
 * Tenant

Temporary Password Delivery Method
If you do not want to submit proof of residency, please select mail.
 Email Mail

- ▶ You will see a confirmation message once your request has successfully been submitted. You will also receive a confirmation email.

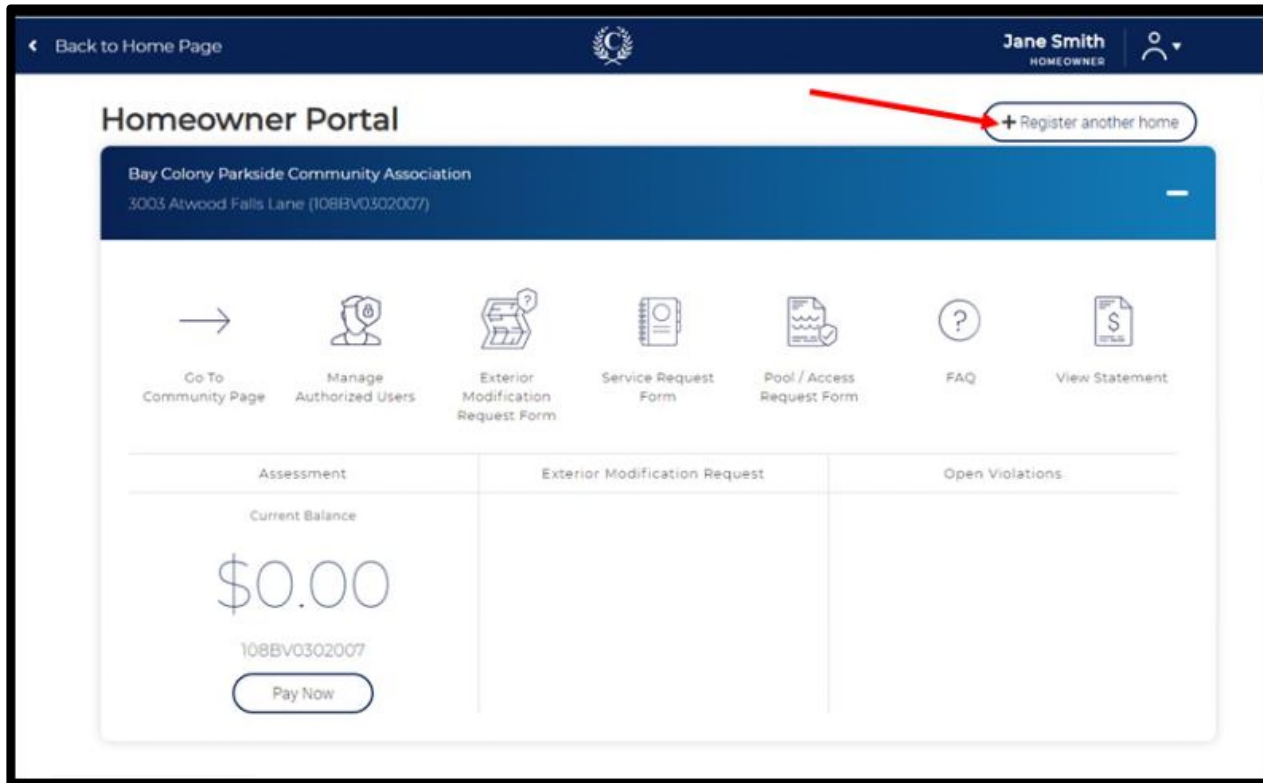


- ▶ Once your request has been processed, you will receive a temporary password by whichever method you selected.

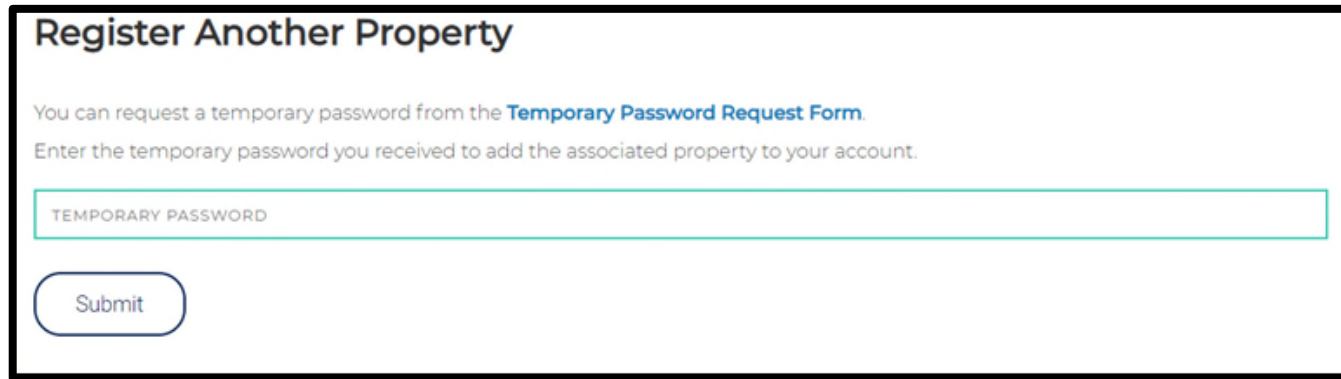


- ▶ After receiving the temporary password by email or mail, go to www.crest-management.com and log in to your account.

- ▶ From your dashboard, click on Register Another Home.



- ▶ Enter the temporary password you received by email or mail.
- ▶ Click Submit.

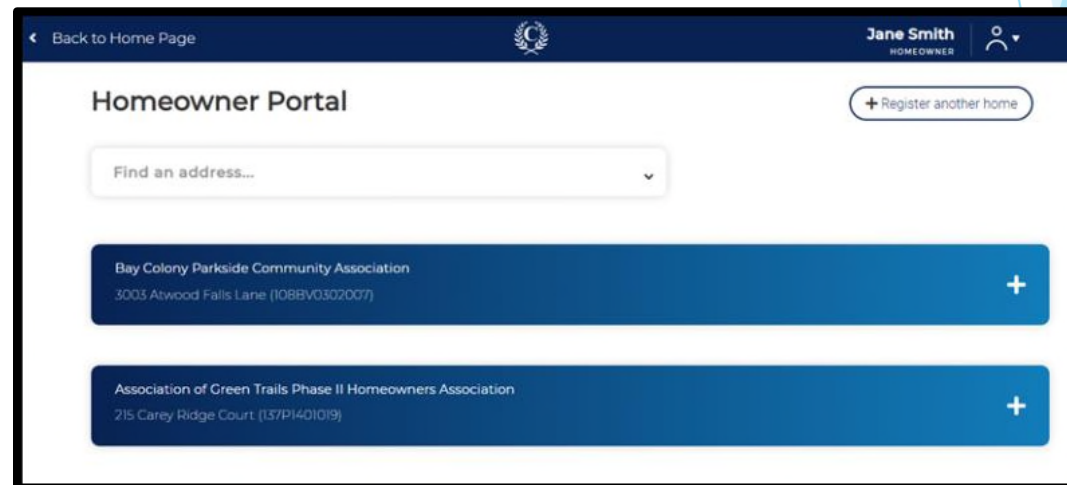


Register Another Property

You can request a temporary password from the [Temporary Password Request Form](#).

Enter the temporary password you received to add the associated property to your account.

- ▶ You will be taken back to your dashboard where you will see each registered home.



Back to Home Page Jane Smith HOMEOWNER

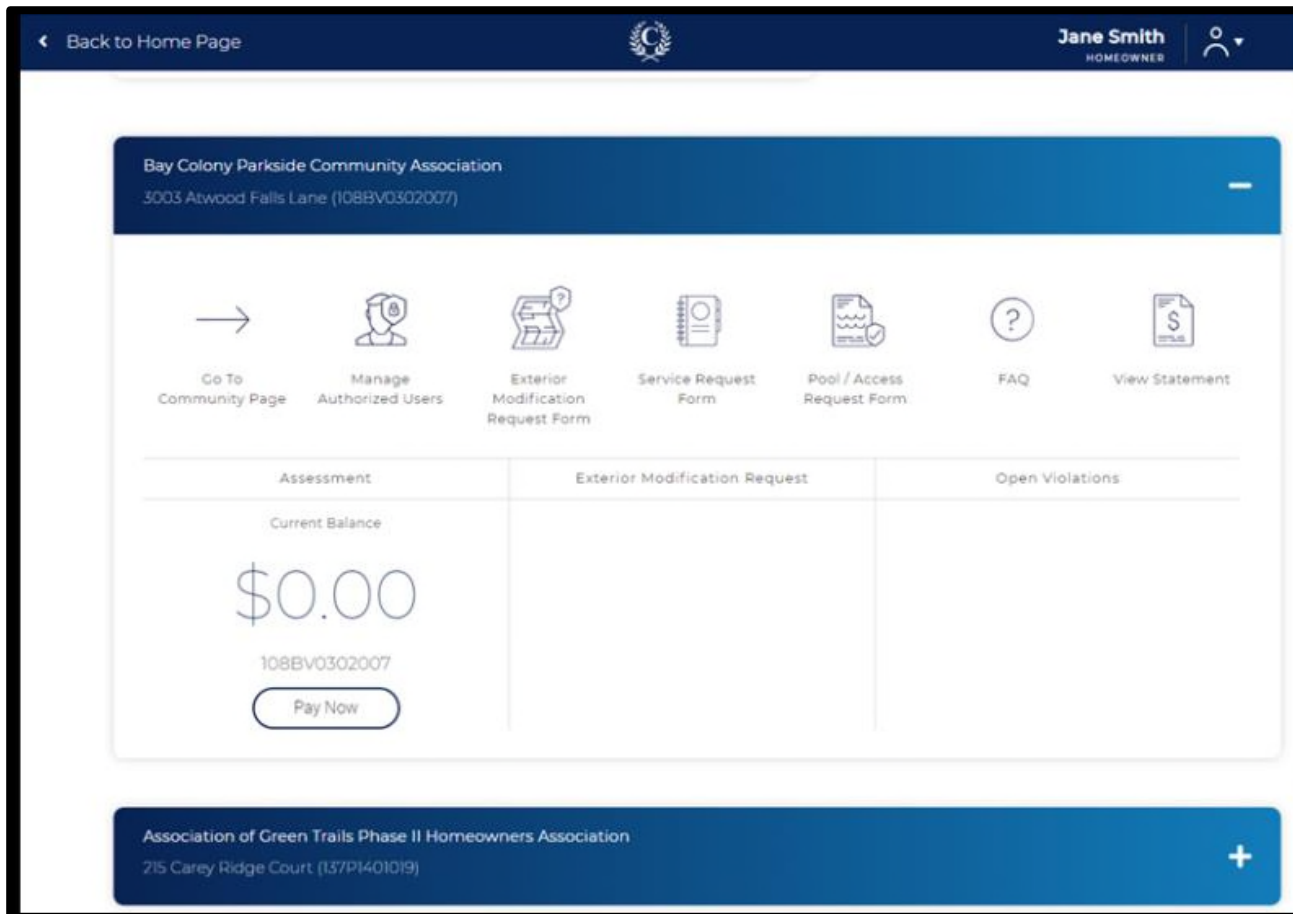
Homeowner Portal

Find an address...

[+ Register another home](#)

- Bay Colony Parkside Community Association
3003 Atwood Falls Lane (10BBV0302007)
- Association of Green Trails Phase II Homeowners Association
215 Carey Ridge Court (137P1401019)

- ▶ Click on an address to expand the dashboard for that home.



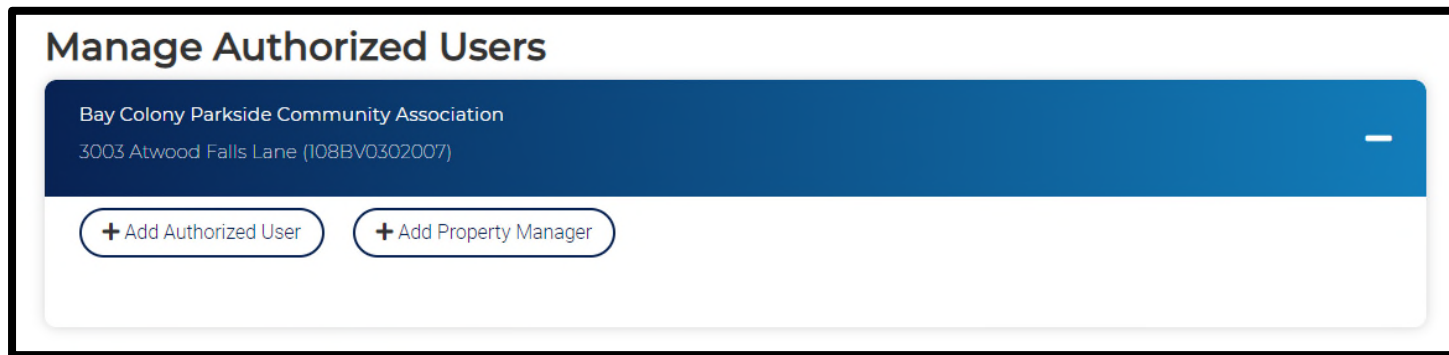
- ▶ From your dashboard, click on Manage Authorized Users.
 - ▶ If you own multiple homes, click on the home you want to work with to expand the dashboard.

Bay Colony Parkside Community Association
3003 Atwood Falls Lane (108BV0302007)

Go To Community Page Manage Authorized Users Exterior Modification Request Form Service Request Form Pool / Access Request Form FAQ View Statement

Assessment	Exterior Modification Request	Open Violations
Current Balance \$0.00 108BV0302007 Pay Now		

- ▶ Select Add Authorized User to add a family member, contractor, or tenant. You can customize what type of access each authorized user is given.



The screenshot shows a user interface titled "Manage Authorized Users". At the top, there is a dark blue header bar with the text "Bay Colony Parkside Community Association" and "3003 Atwood Falls Lane (108BV0302007)". Below the header, there are two buttons: "+ Add Authorized User" and "+ Add Property Manager".

- ▶ Enter the Email, Name and Phone Number of the authorized user.
- ▶ Click Add User.

Manage Authorized Users

Bay Colony Parkside Community Association
3003 Atwood Falls Lane (108BV0302007)

Email Name Phone

Access

▶ If you have more than one home registered, you will be asked if you want to grant the authorized user access to other homes as well.

▶ Click Edit User.

▶ Select what the authorized user is permitted to access.

▶ Click Save User.

Add Authorized User

Name: Jonie Smith
Email: saltsoul@mailinator.com
Phone: 281-281-2811
Access:

Would you like to update or add this user to other properties you manage? They will be granted the rights specified above, as applicable.

215 Carey Ridge Court

Manage Authorized Users

Association of Green Trails Phase II Homeowners Association
1311 Hathorn Way Drive (137P0604004)

Email	Name	Phone	
saltsoul@mailinator.com	Jonie Smith	281-281-2811	<input type="button" value="Edit User"/>

Access

<input type="checkbox"/> View Balance	<input type="checkbox"/> Submit EMR	<input type="checkbox"/> Submit Access Device
<input type="checkbox"/> View Exterior Modifications	<input type="checkbox"/> View Open Violations	<input type="checkbox"/> View Closed Violations
<input type="checkbox"/> View Account Number		

- ▶ The authorized user will receive an email containing their log in information.

Subject: Welcome to Crest
To: saltysoul
From: do_not_reply@crest-management.com
Received: Fri Jul 24 2020 00:00:02 GMT-0500 (Central Daylight Time)

Welcome to Crest! You have been added as an authorized user for address: 1311 Hathorn Way Drive.

Your user id is: saltysoul@mailinator.com and your password is: PasswordPassword24. You may log in at the [Crest Portal](https://www.crest-management.com) (https://www.crest-management.com).

- ▶ Edit an authorized user by clicking Edit User. You can update the name, phone number, and what they are permitted to access.
 - ▶ The email address cannot be updated. If the authorized user's email has change, you must delete the user and add them as a new authorized user.
- ▶ Click Save User.

The screenshot displays the 'Manage Authorized Users' interface. At the top, there is a header for 'Bay Colony Parkside Community Association' with the address '3003 Atwood Falls Lane (108BV0302007)'. Below this, a table lists user details for 'Jonie Smith' with email 'saltsoul@mailinator.com' and phone '281-281-2811'. To the right of the table are buttons for 'Edit User', 'Delete User', and 'Reset Password'. Under the 'Access' section, there are checkboxes for 'View Balance', 'View Open Violations', 'Submit EMR', 'View Account Number', and 'Submit Access Device'. At the bottom of the interface, there are buttons for '+ Add Authorized User' and '+ Add Property Manager', and a footer for 'Association of Green Trails Phase II Homeowners Association' with the address '215 Carey Ridge Court (137P1401019)'.

Email	Name	Phone	
saltsoul@mailinator.com	Jonie Smith	281-281-2811	Edit User

Access

View Balance Submit EMR Submit Access Device

View Open Violations View Account Number

[+ Add Authorized User](#) [+ Add Property Manager](#)

[X Delete User](#)

[Reset Password](#)

- ▶ To delete an authorized user, click Delete User.

Manage Authorized Users

Bay Colony Parkside Community Association
3003 Atwood Falls Lane (108BV0302007)

Email	Name	Phone	
saltsoul@mailinator.com	Jonie Smith	281-281-2811	Edit User

Access

View Balance Submit EMR Submit Access Device
 View Open Violations View Account Number

[+ Add Authorized User](#) [+ Add Property Manager](#)

Association of Green Trails Phase II Homeowners Association
215 Carey Ridge Court (137P1401019)

- ▶ Click Revoke Access.

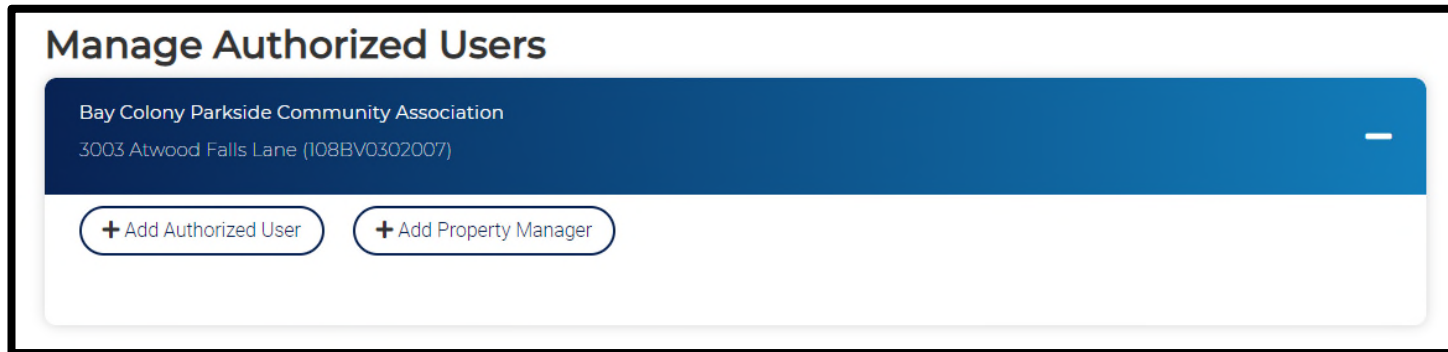
Remove Authorized User

Name: Jonie Smith
Email: saltsoul@mailinator.com
Phone: 281-281-2811
Access: Submit Access Device, View Open Violations

You are about to remove this user from this property.

[Cancel](#) [Revoke Access](#)

- ▶ Select Add Property Manager if you have hired a property manager to act on your behalf. Property managers are granted full access to the account and can also manage authorized users.



The screenshot shows a user interface titled "Manage Authorized Users". At the top, there is a dark blue header bar with the text "Bay Colony Parkside Community Association" and "3003 Atwood Falls Lane (108BV0302007)". Below the header, there are two buttons: "+ Add Authorized User" and "+ Add Property Manager".

- ▶ Enter the Email, Name and Phone Number of the property manager.
- ▶ Click Add User.

Manage Authorized Users

Association of Green Trails Phase II Homeowners Association
1311 Hathorn Way Drive (I37P0604004)

Email Name Phone

Access

Property Manager
Property Managers have equivalent access to homeowners and can manage authorized users as well.

- ▶ If you have more than one home registered, you will be asked if you want to grant the property manager access to other homes as well.

Add Property Manager

Name: AI Prop Mgmt
Email: a1pm@mailinator.com
Phone: 832-832-8322
Access:

Would you like to update or add this user to other properties you manage? They will be granted the rights specified above, as applicable.

3003 Atwood Falls Lane

- ▶ The property manager will receive an email containing their log in information.

Subject: **Welcome to Crest**
To: **a1pm**
From: **do_not_reply@crest-management.com**
Received: **Fri Jul 24 2020 00:16:03 GMT-0500 (Central Daylight Time)**

Welcome to Crest! You have been added as a property manager for address: 1311 Hathorn Way Drive.

Your user id is: **a1pm@mailinator.com** and your password is: **PasswordTest40**. You may log in at the [Crest Portal](https://www.crest-management.com) (<https://www.crest-management.com>).

- ▶ Click Edit User to edit a property manager's name or phone number.
 - ▶ The email address cannot be updated. If the property manager's email has change, you must delete them and add them as a new property manager.
- ▶ Click Save User.

Manage Authorized Users

Association of Green Trails Phase II Homeowners Association
1311 Hathorn Way Drive (137P0604004)

Email	Name	Phone	
a1pm@mailinator.com	AI Prop Mgmt	832-832-8322	✎ Edit User
			✖ Delete User

Access

Property Manager
Property Managers have equivalent access to homeowners and can manage authorized users as well.

[+ Add Authorized User](#) [+ Add Property Manager](#)