Homeowner Portal User Guide

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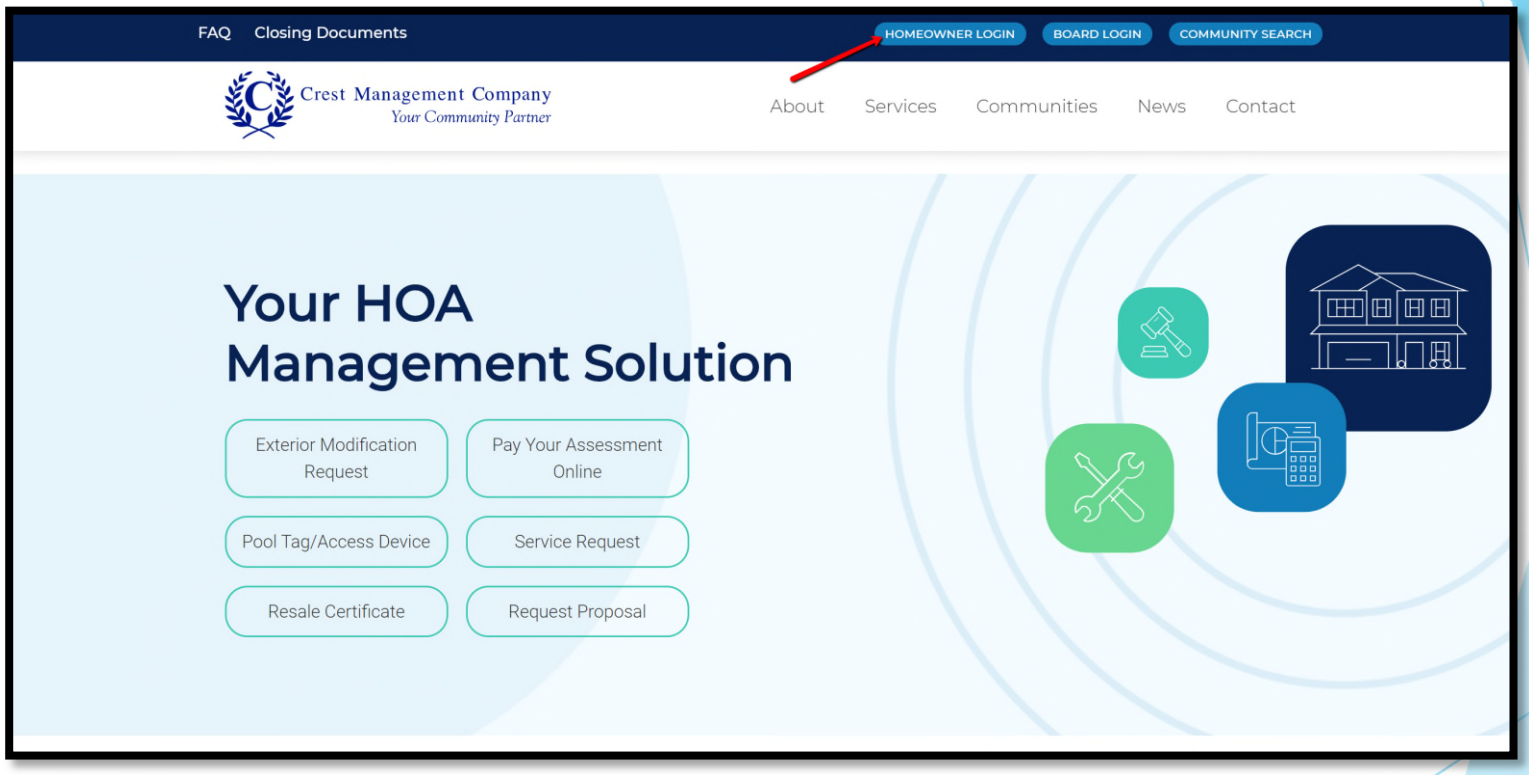
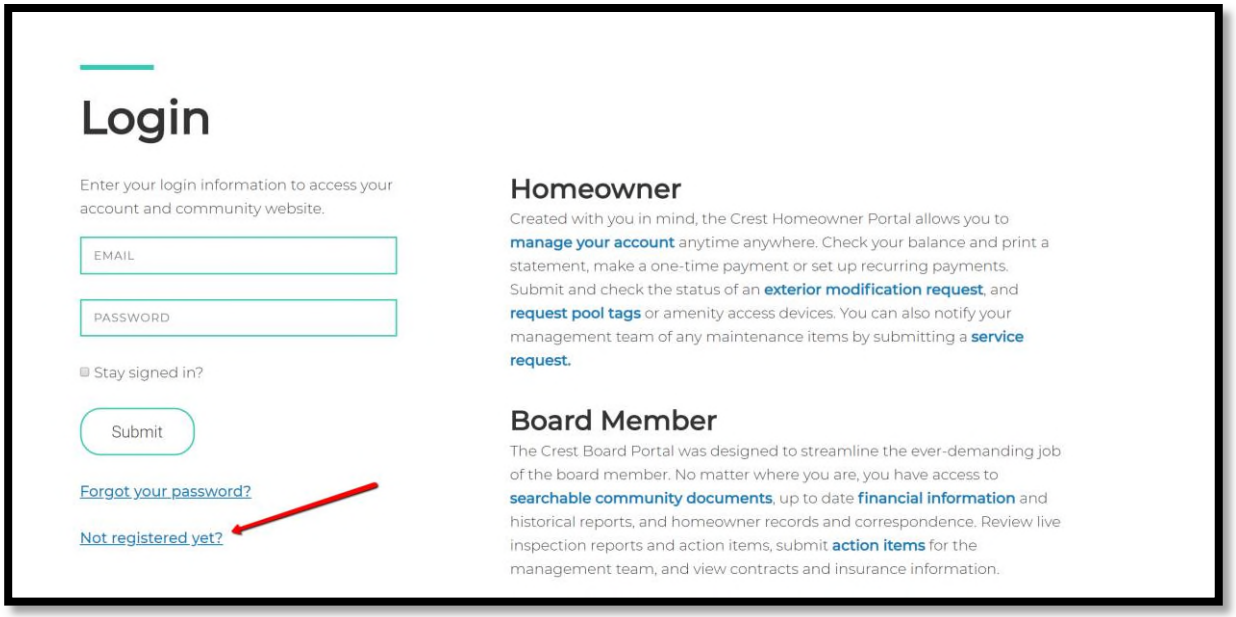
Page 18 – Adding additional homes to an existing registration
Page 28 – Adding, editing, and deleting authorized users
Page 35 – Adding, editing, and deleting property managers

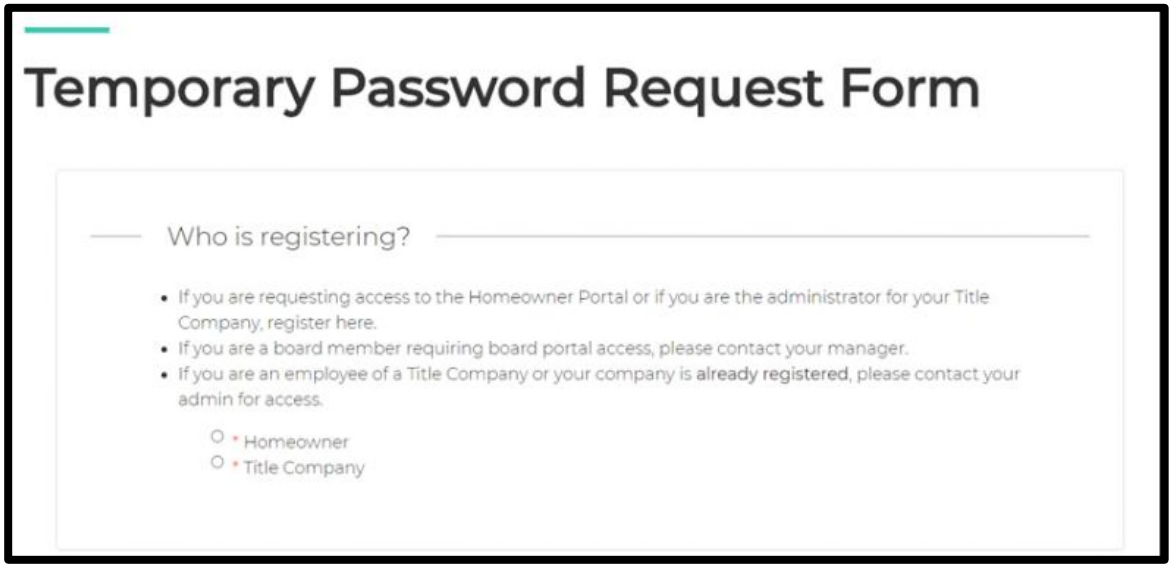
- Go to www.crest-management.com and click on Homeowner Login.



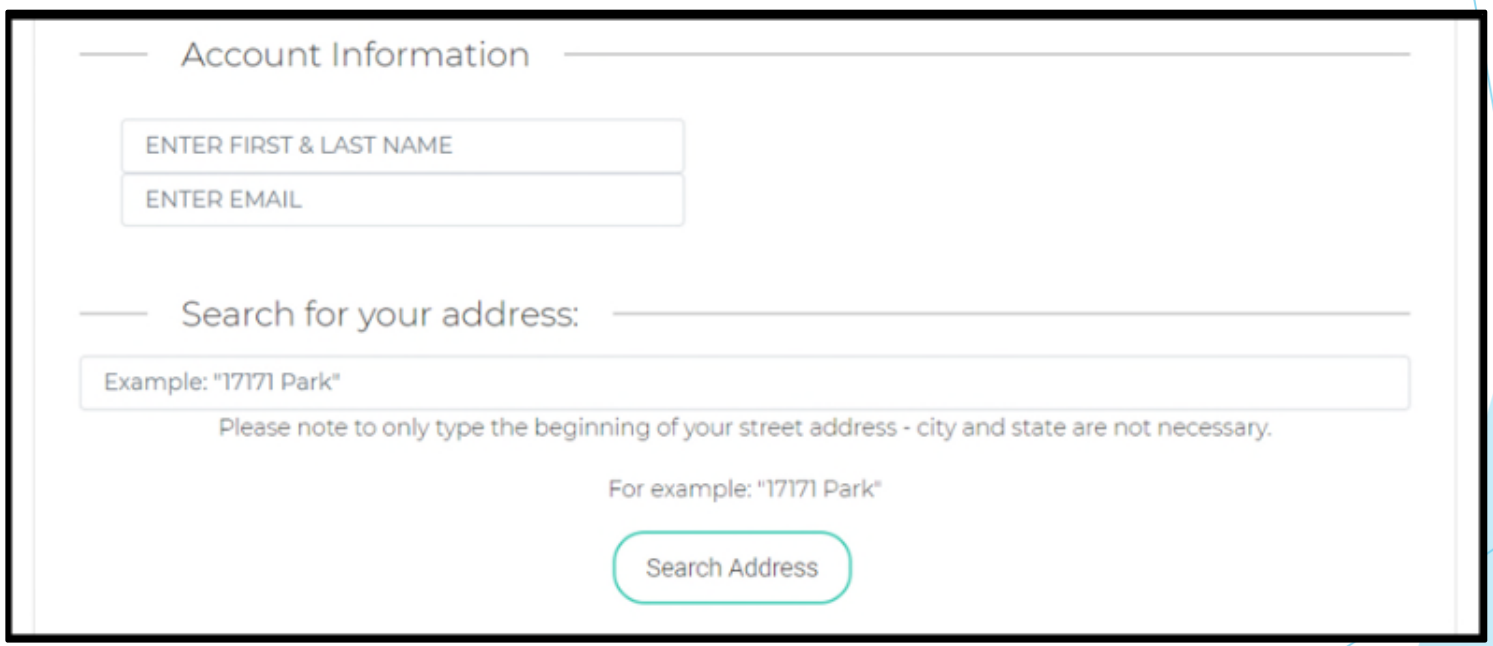
- Click on Not Registered Yet?



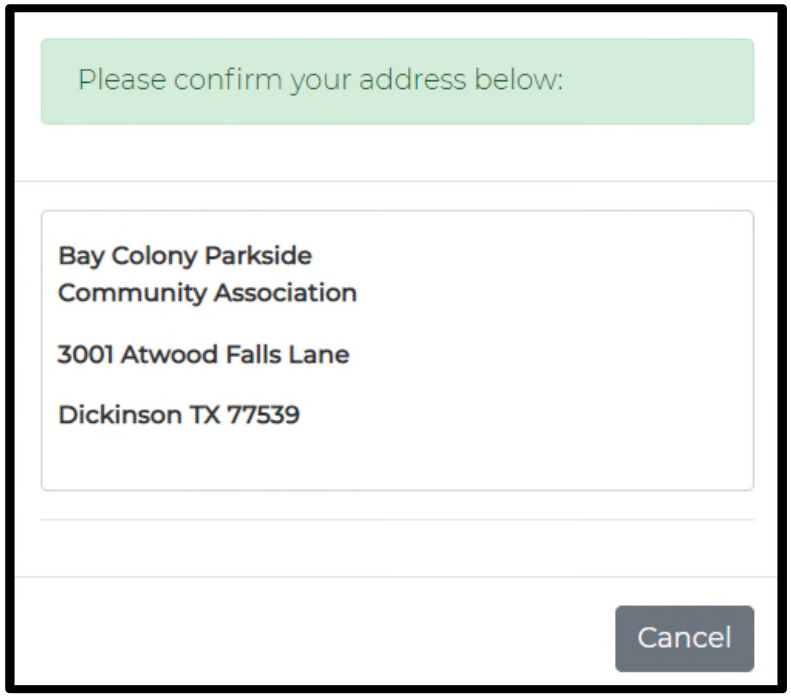
- Select whether you are a Homeowner or Title Company
- Click Continue.



- 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.

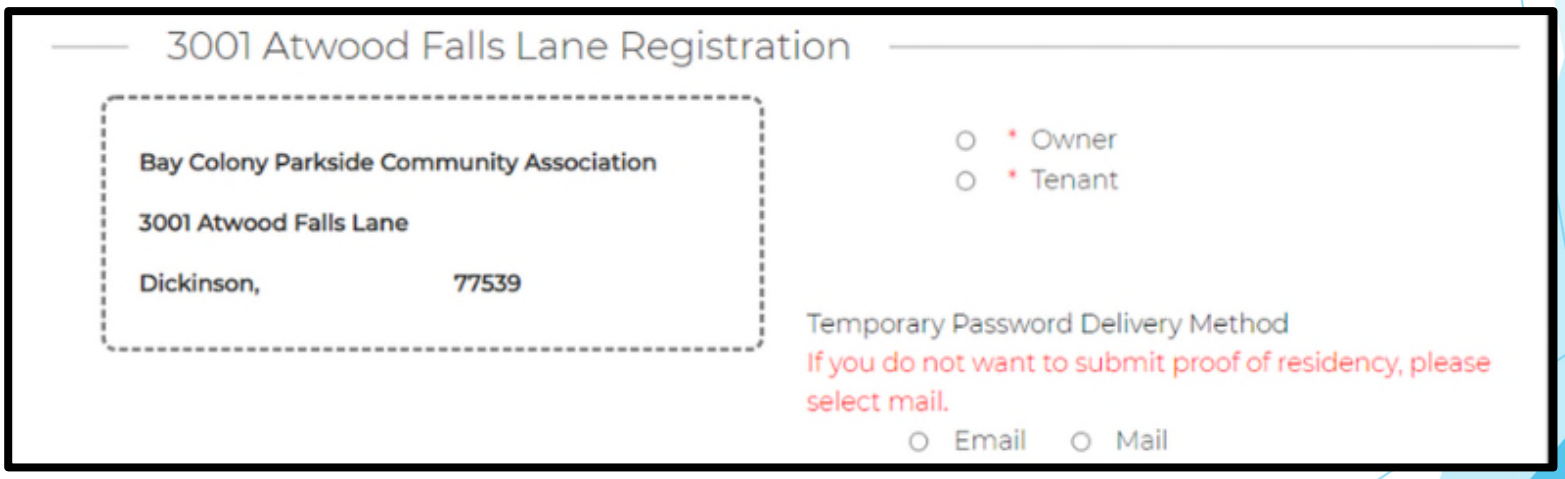


- Click on your address to proceed. If your address is not shown, click Cancel to go back.

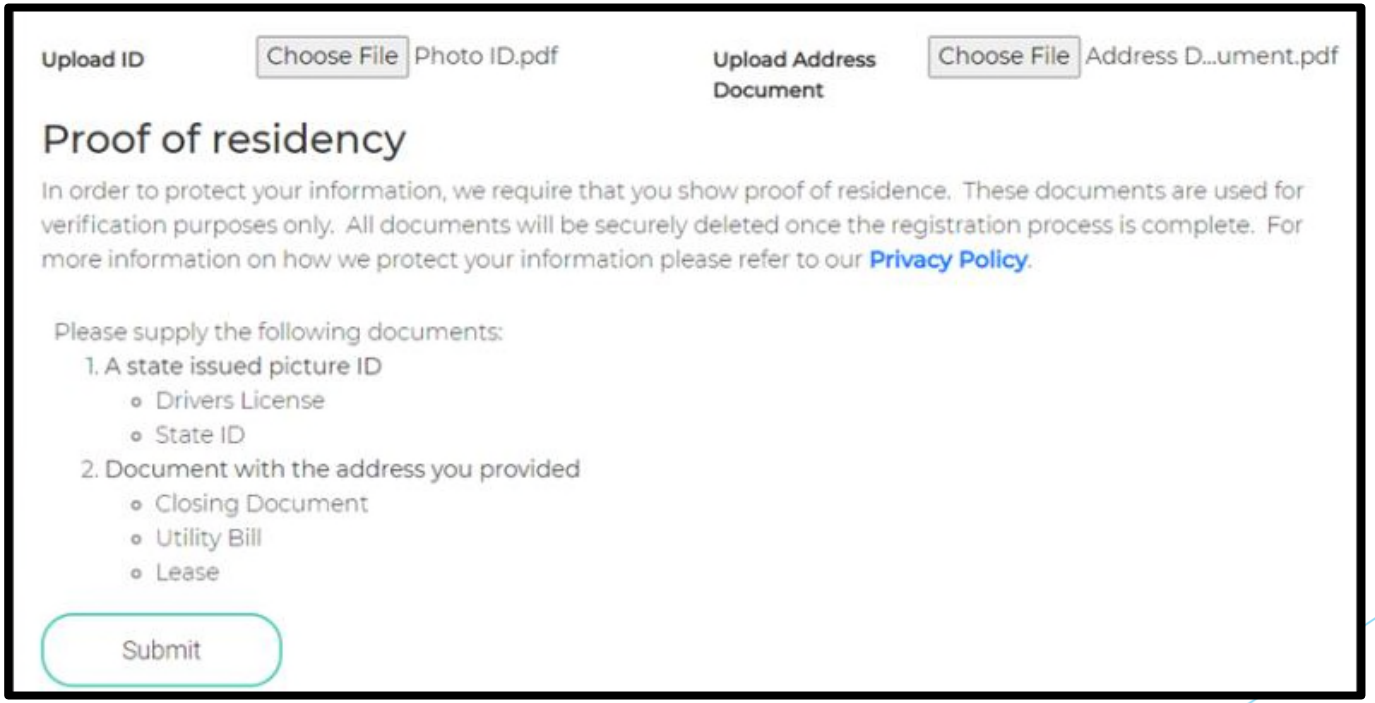


- If you own more than one home, you can continue to search for the addresses one by one and add them to the registration.

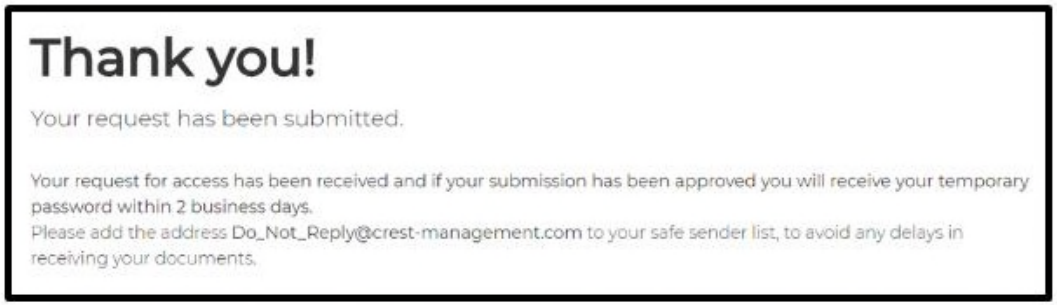
- Select whether you are an Owner or Tenant.
- Select whether you want to receive your temporary password by email or mail. *To receive it by email, you are required to upload two proof of residency documents including a state-issued photo ID and an additional document listing your name and property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

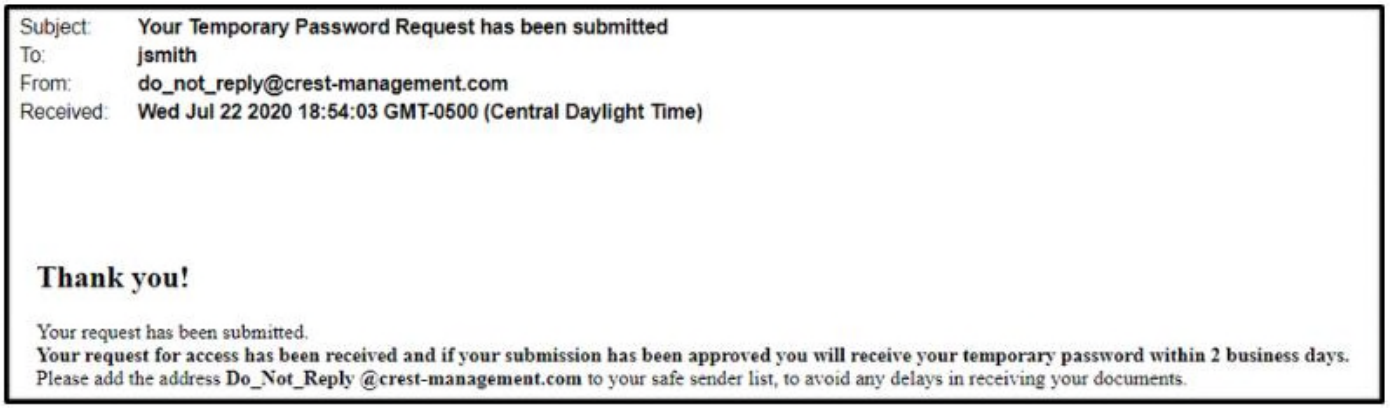


- If you chose to receive your password by email, click Choose File to find and select your documents. Make sure to upload separate documents to the Upload ID and Upload Address Document fields.
- If you chose to receive your password by mail, the upload fields will not be present.
- Click Submit.

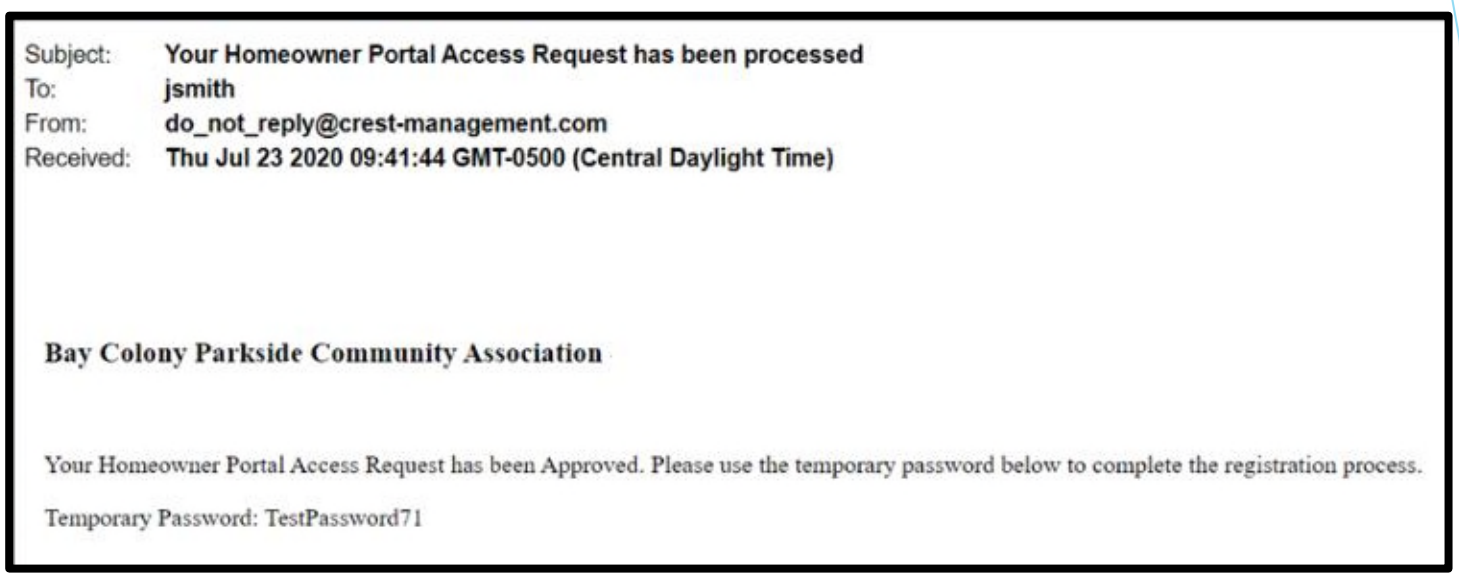


- You will see a confirmation message once your request has successfully been submitted. You will also receive a confirmation email. If you do not receive the email, notify your management team.





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



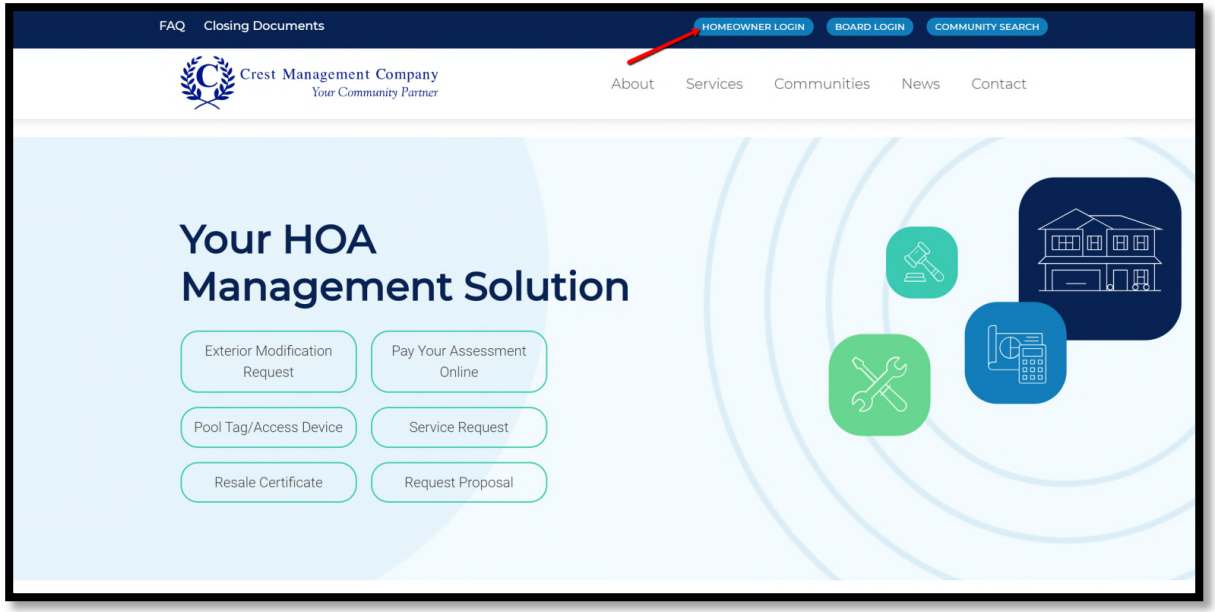
Subject: **Your Homeowner Portal Access Request has been processed**
To: **jsmith**
From: **do_not_reply@crest-management.com**
Received: **Thu Jul 23 2020 09:41:44 GMT-0500 (Central Daylight Time)**

Bay Colony Parkside Community Association

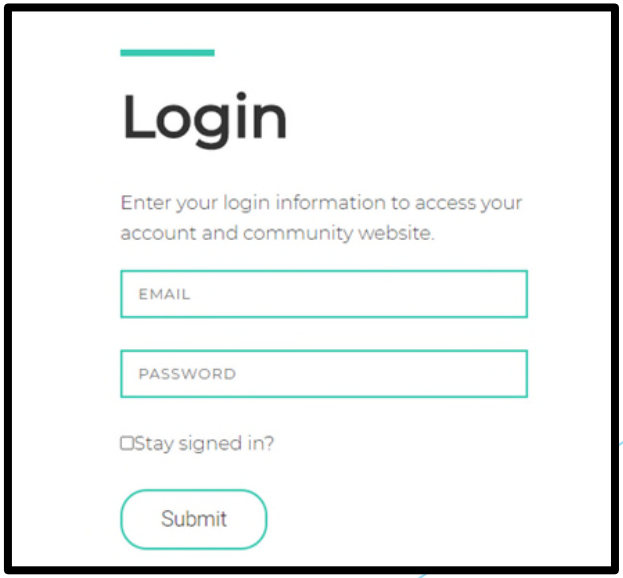
Your Homeowner Portal Access Request has been Approved. Please use the temporary password below to complete the registration process.

Temporary Password: TestPassword71

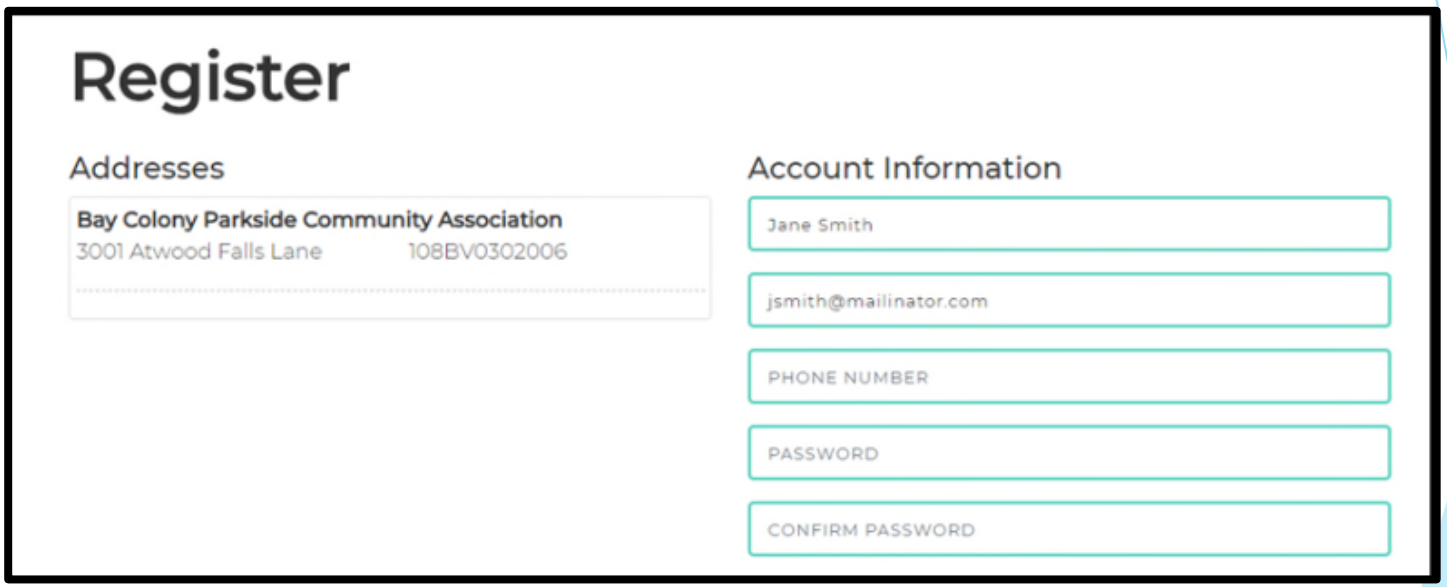
- Go to www.crest-management.com and click on Homeowner Login.



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

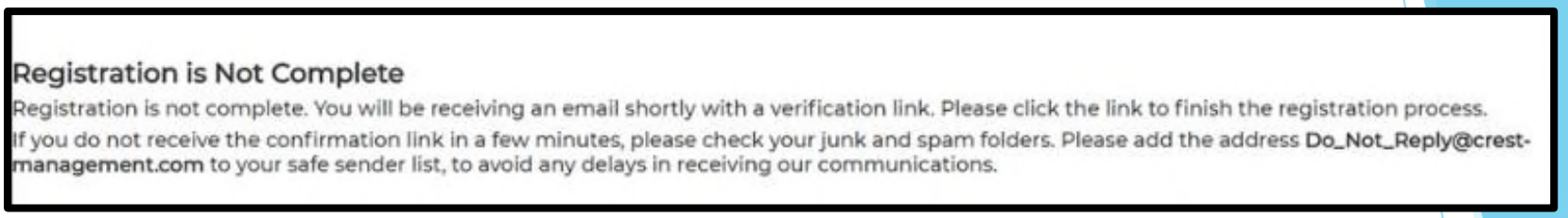


- Your name and address will be prefilled.
- Enter your phone number.
- Enter the password of your choice.
- Confirm the password by entering it again.



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

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

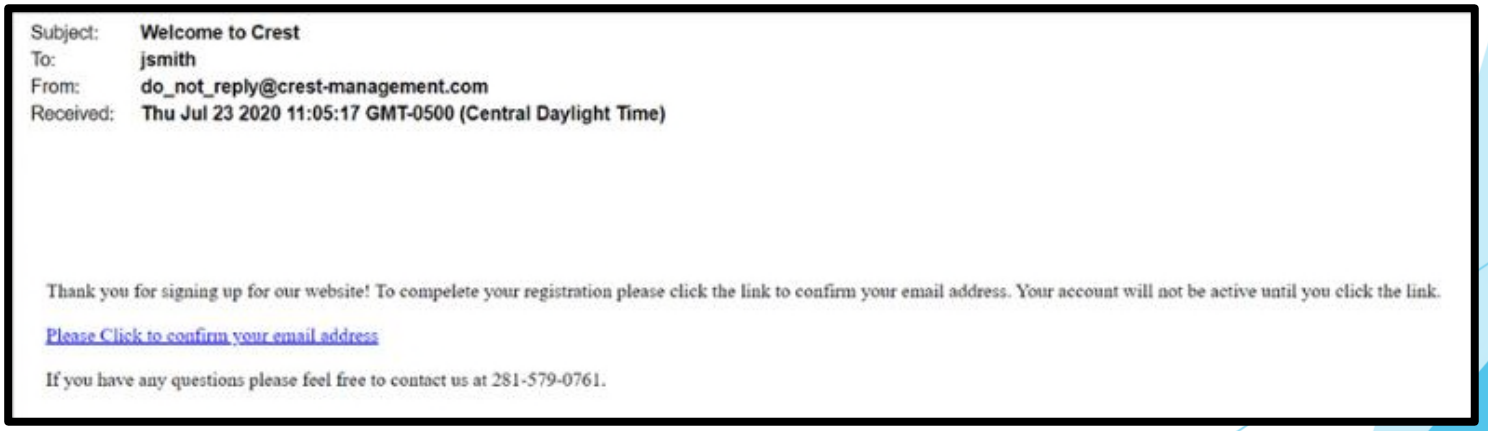


Registration is Not Complete

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.



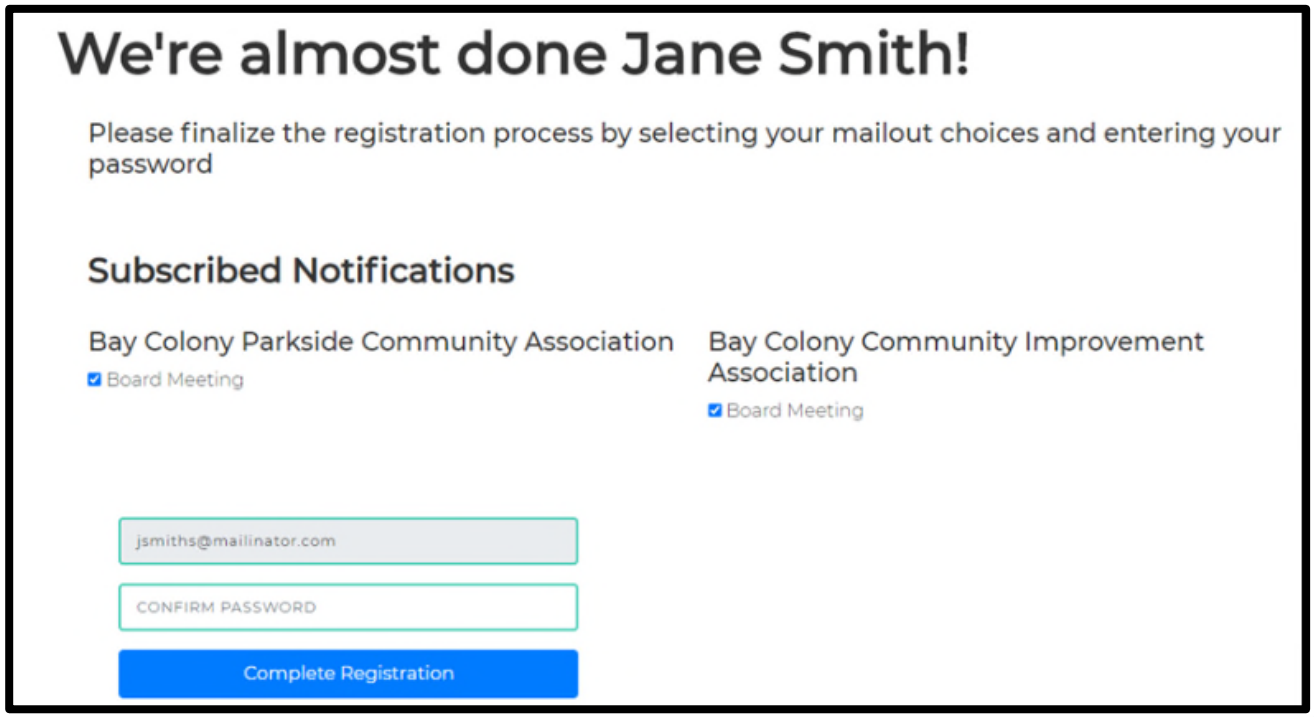
Subject: **Welcome to Crest**
To: **jsmith**
From: **do_not_reply@crest-management.com**
Received: **Thu Jul 23 2020 11:05:17 GMT-0500 (Central Daylight Time)**

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

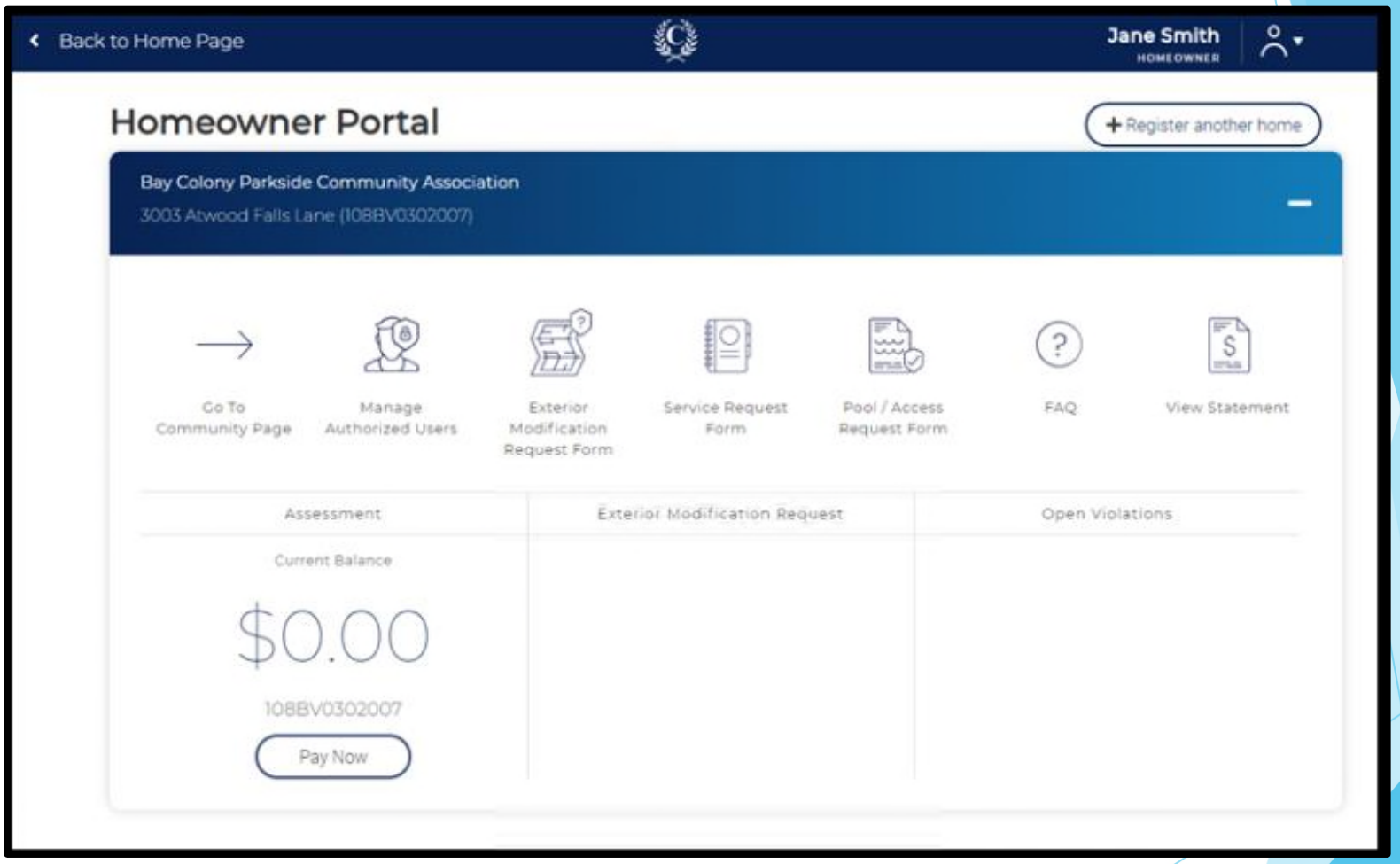
Please Click to confirm your email address

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

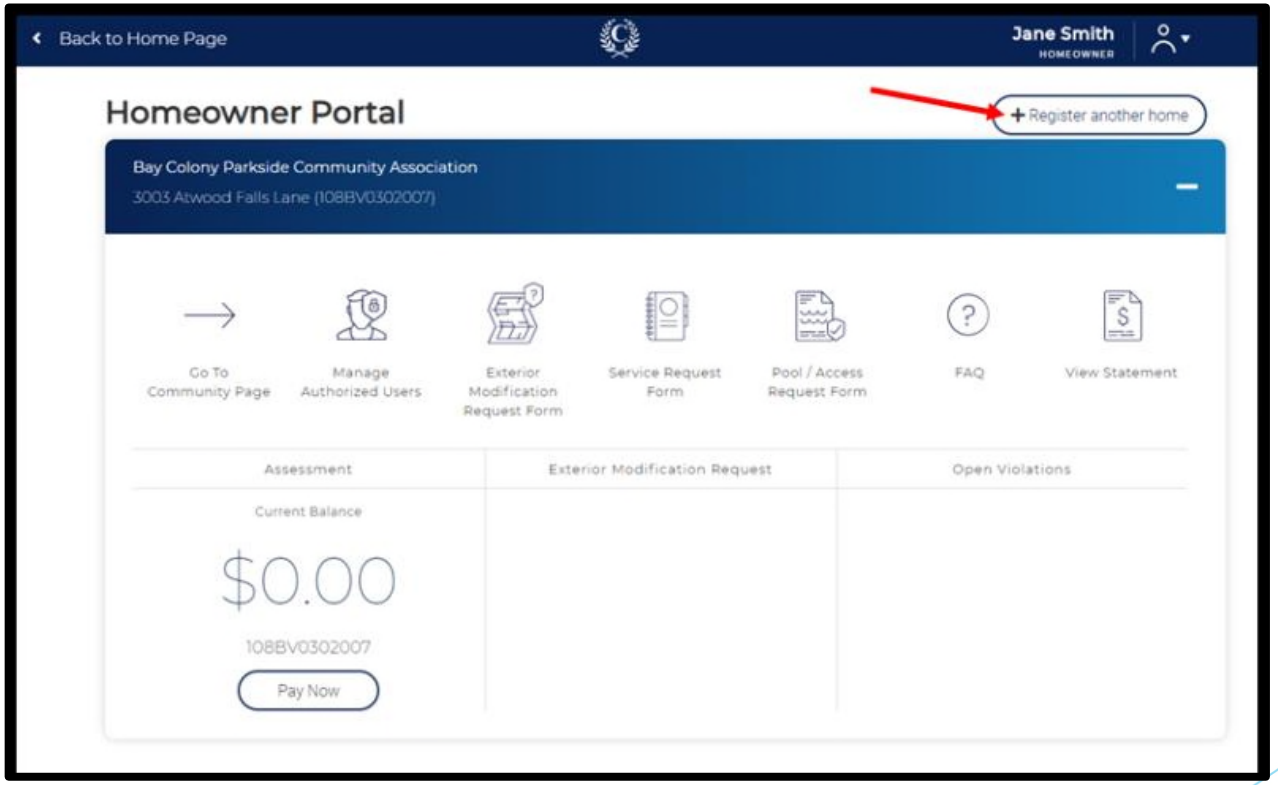
- Select your mailout choices.
- Enter the password you selected.
- Click Complete Registration.



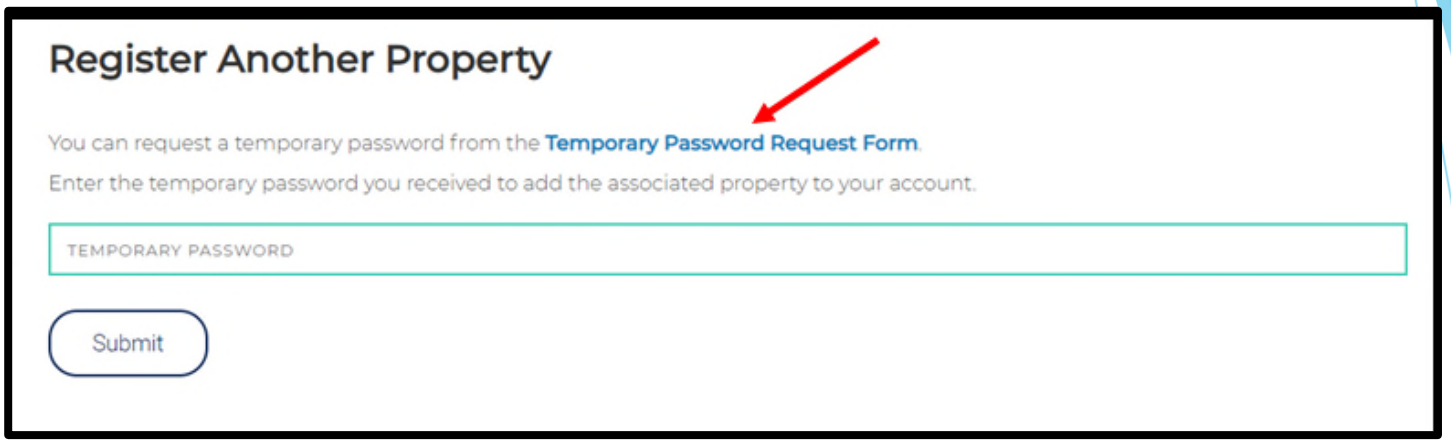
- Welcome to your Homeowner Dashboard!



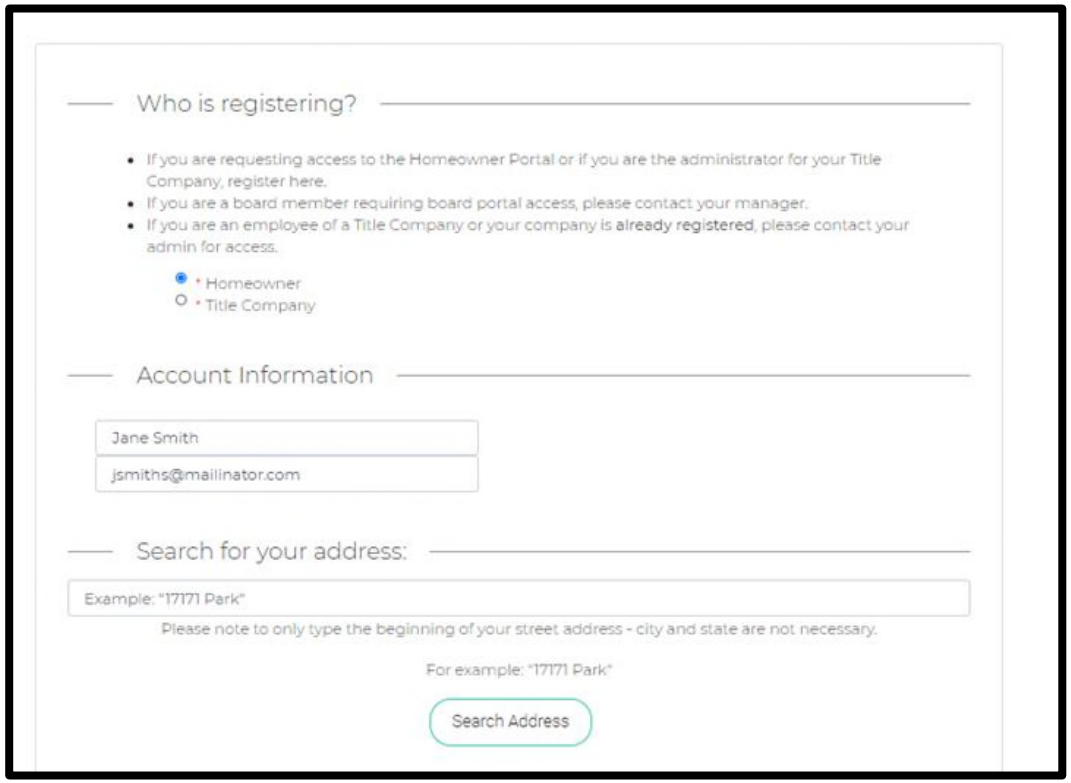
- If you are a homeowner or investor that owns more than one home in Crest-managed communities, you may add all homes to the same registration.
- Log in to your account and from your dashboard, click Register Another Home.



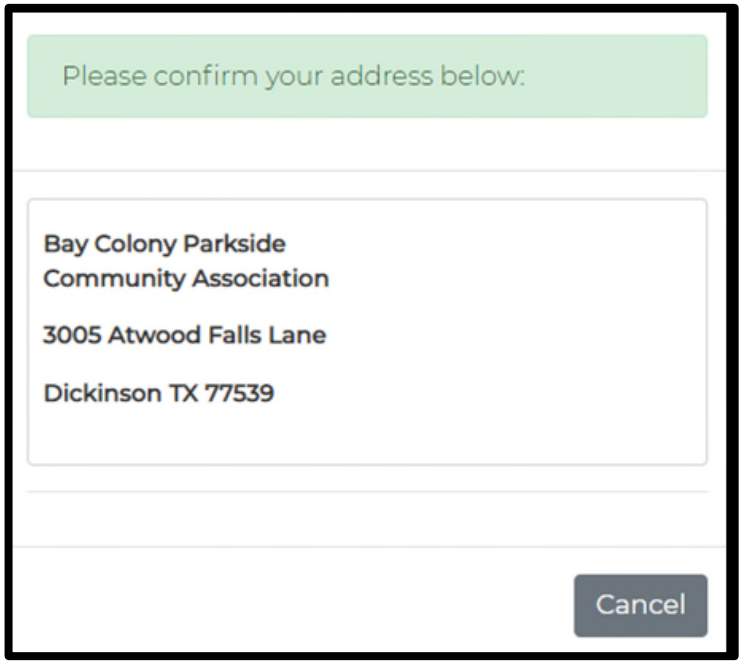
- Click the Temporary Password Request Form link.



- 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.

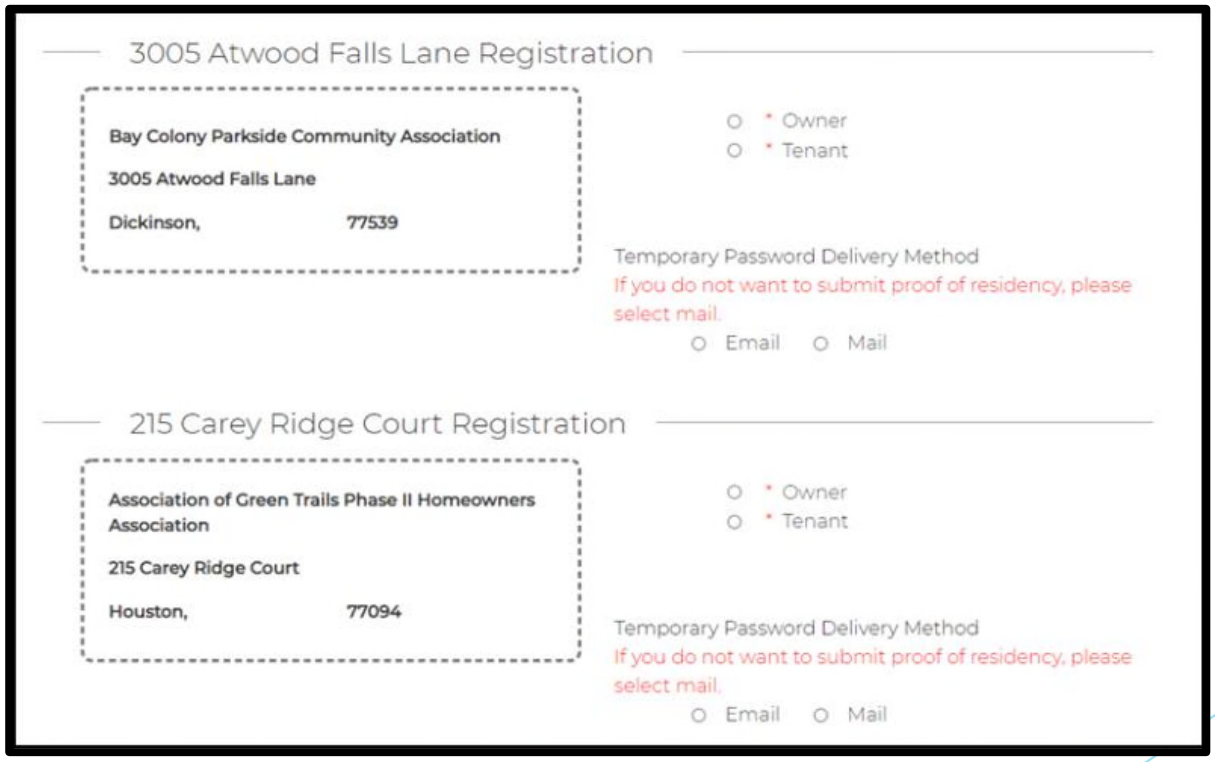


- Click on your address to proceed. If your address is not shown, click Cancel to go back.

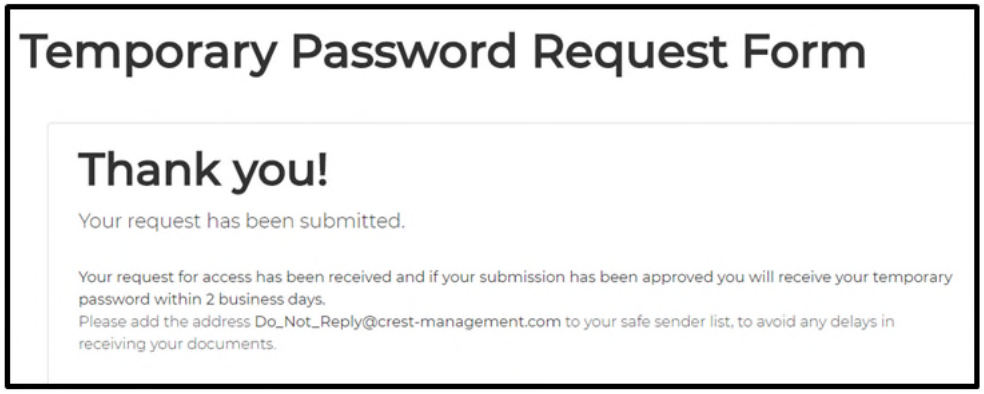


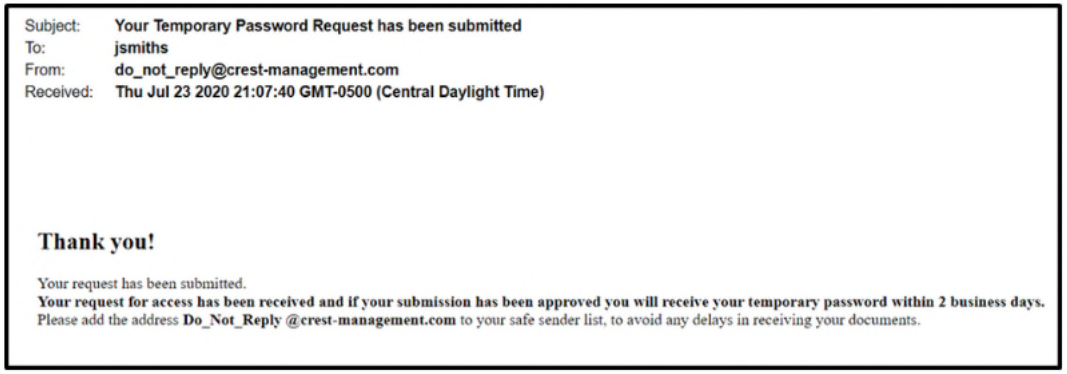
- The address will now appear below. The search bar will remain open and you can continue to add additional properties you own until complete.

- 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.



- 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.

Subject: **Your Homeowner Portal Access Request has been processed**
To: **jsmiths**
From: **do_not_reply@crest-management.com**
Received: **Thu Jul 23 2020 21:13:07 GMT-0500 (Central Daylight Time)**

Association of Green Trails Phase II Homeowners Association - 215 Carey Ridge Court

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

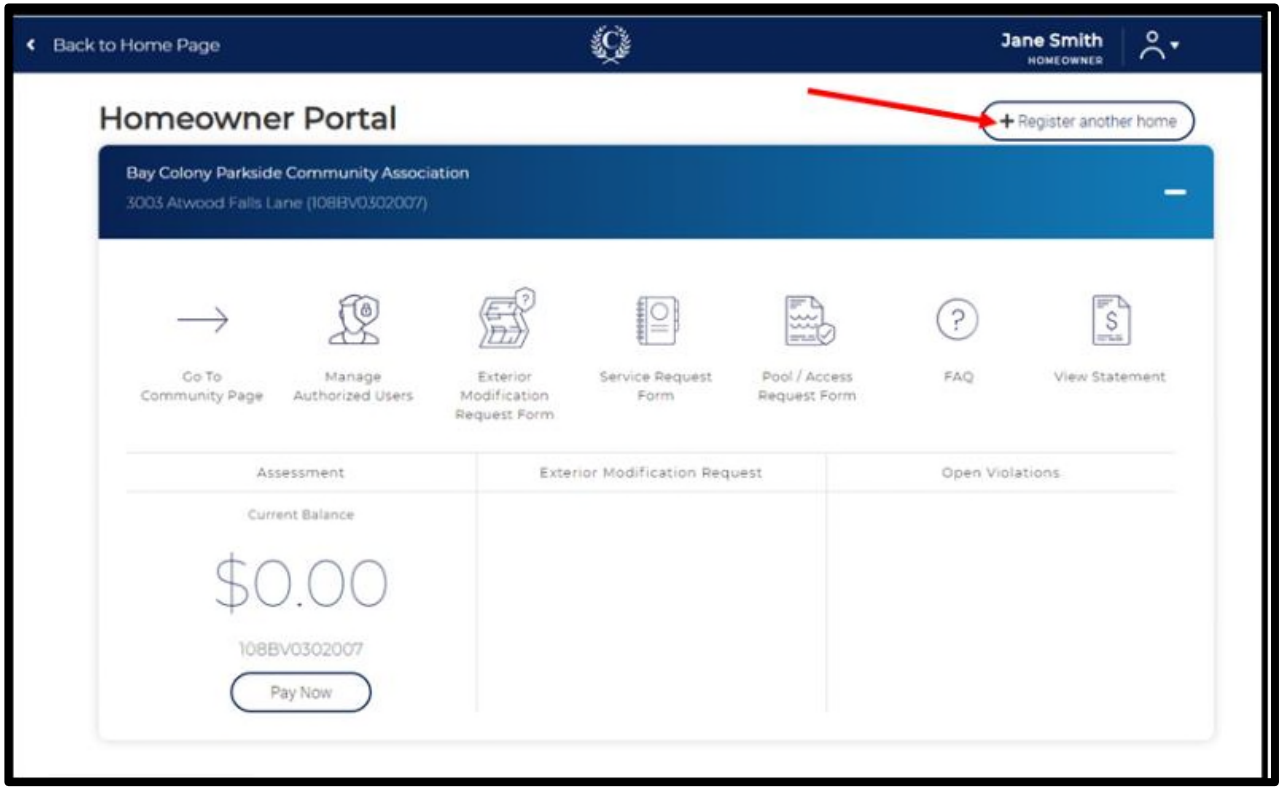
Temporary Password: PasswordTest57

Bay Colony Parkside Community Association - 3005 Atwood Falls Lane

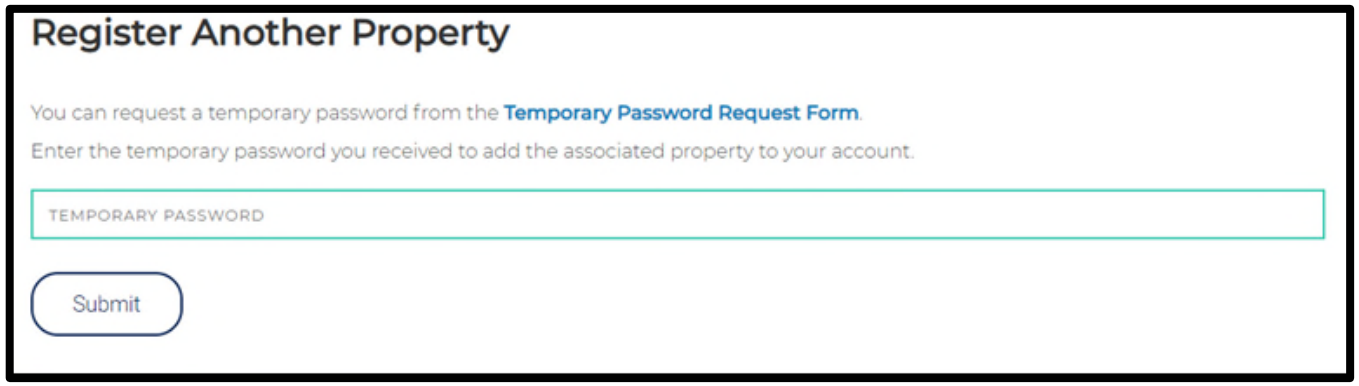
Your Homeowner Portal Access Request has been Denied for the following reason(s): The information submitted does not match our ownership records. Please submit proof of ownership.

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

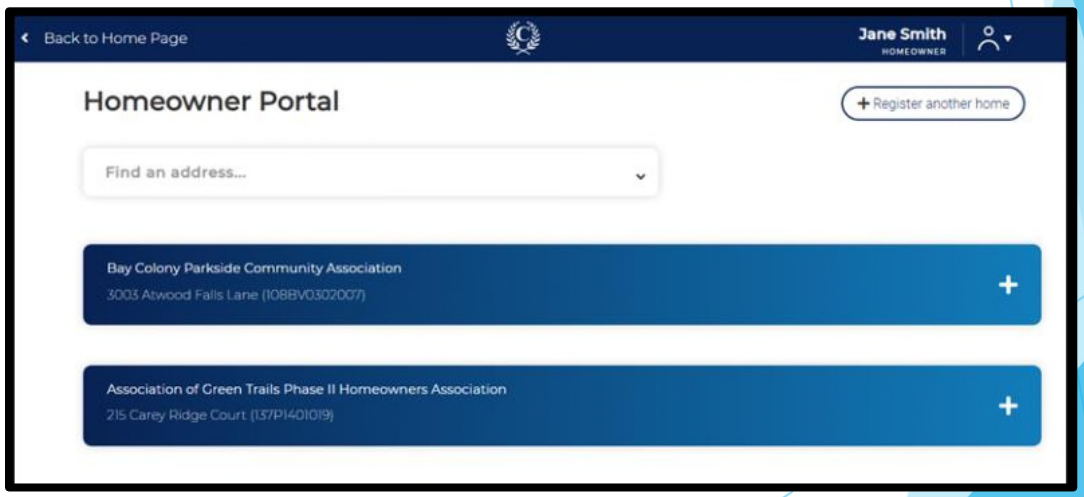
- From your dashboard, click on Register Another Home.



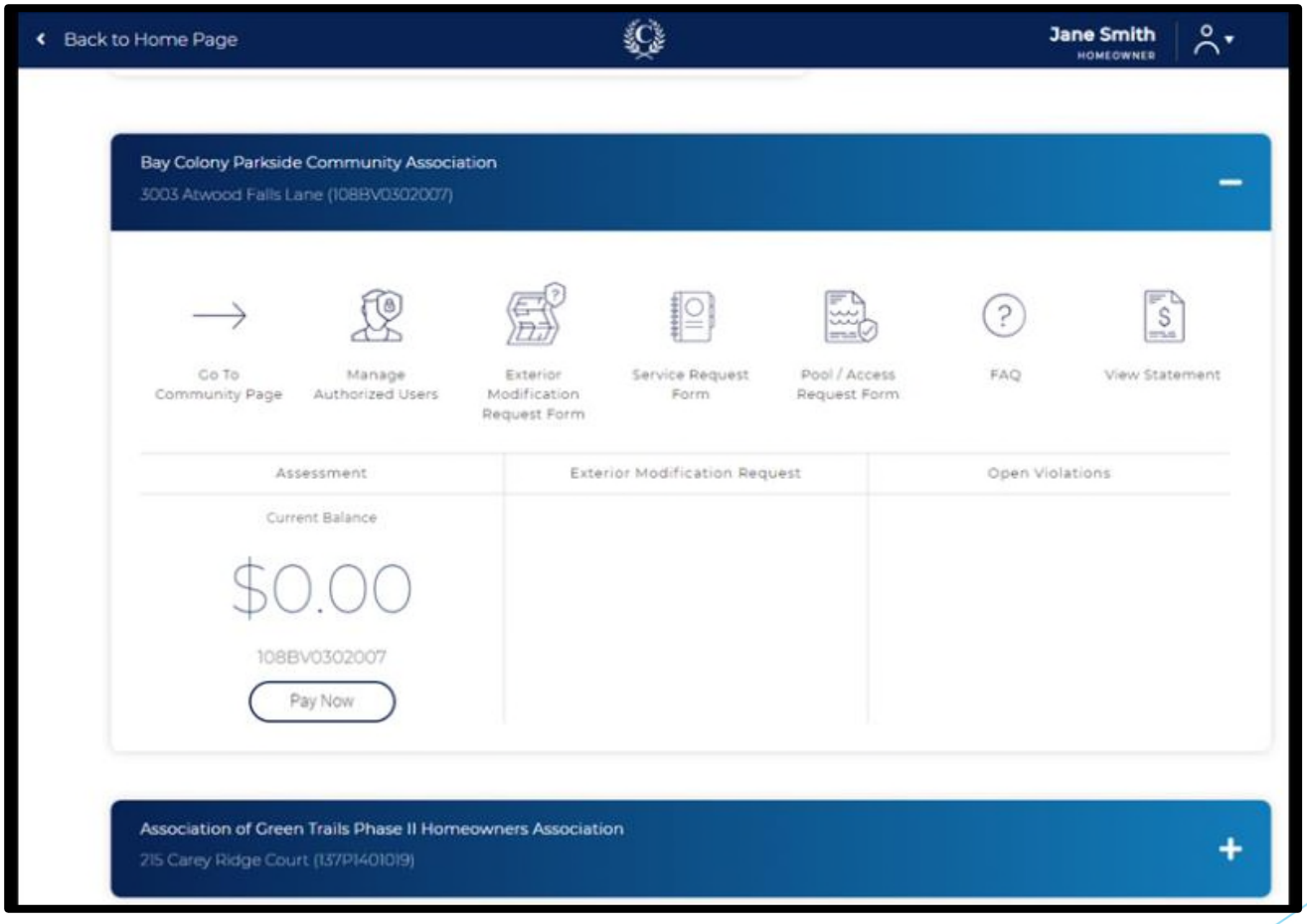
- Enter the temporary password you received by email or mail.
- Click Submit.



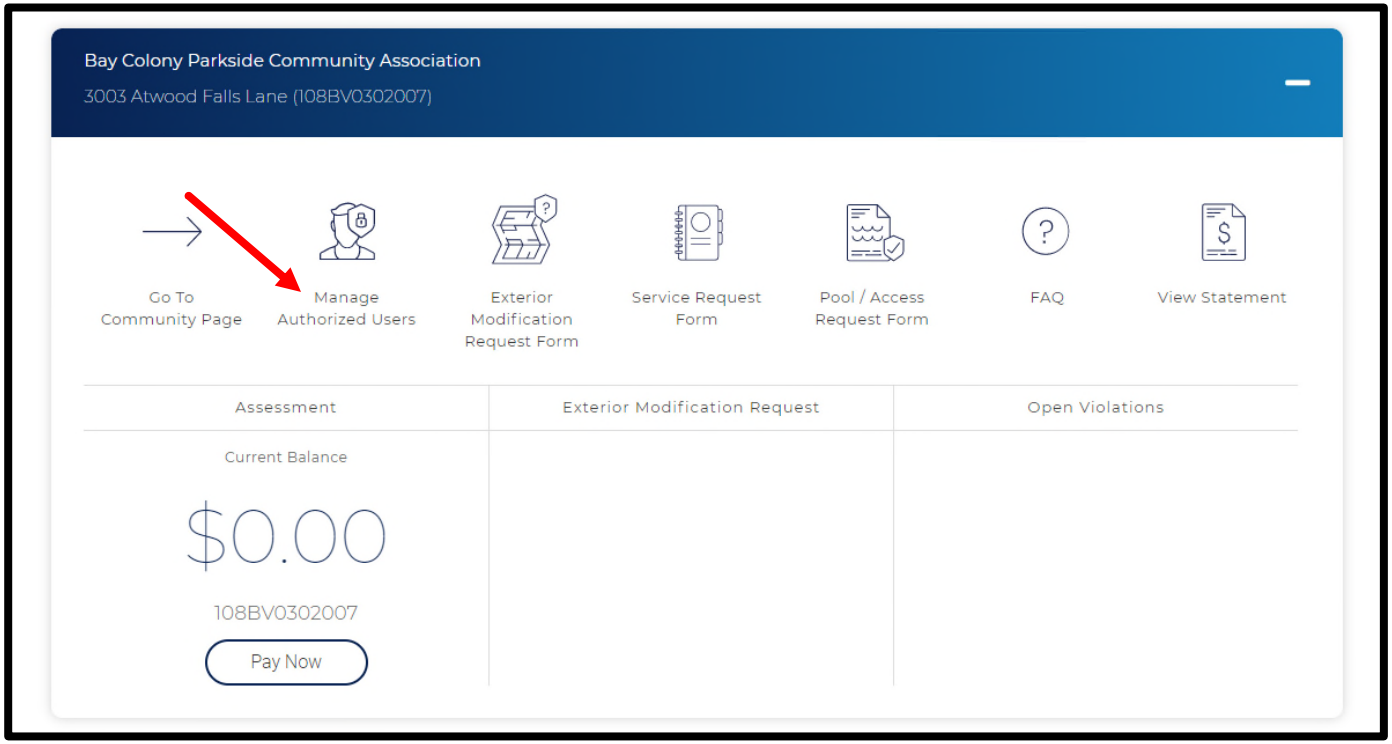
- You will be taken back to your dashboard where you will see each registered home.



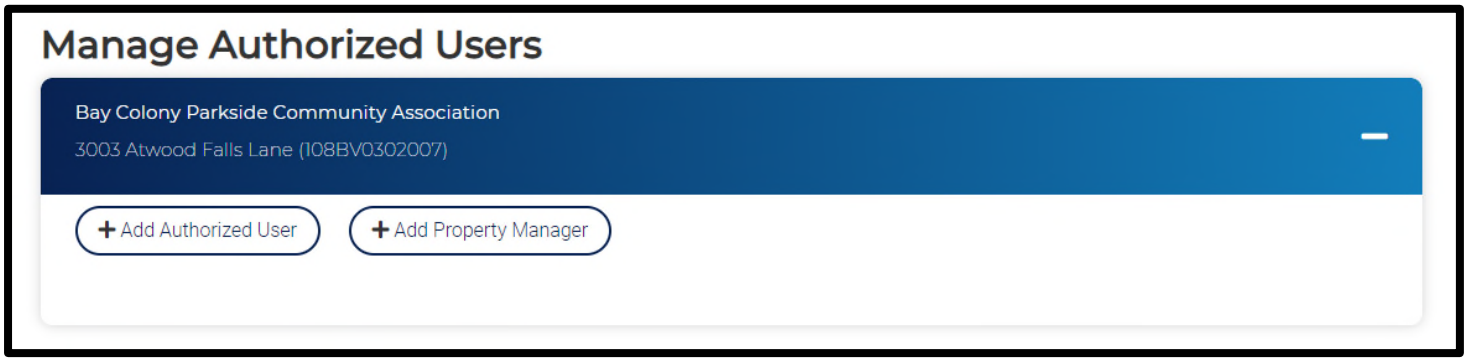
- Click on an address to expand the dashboard for that home.



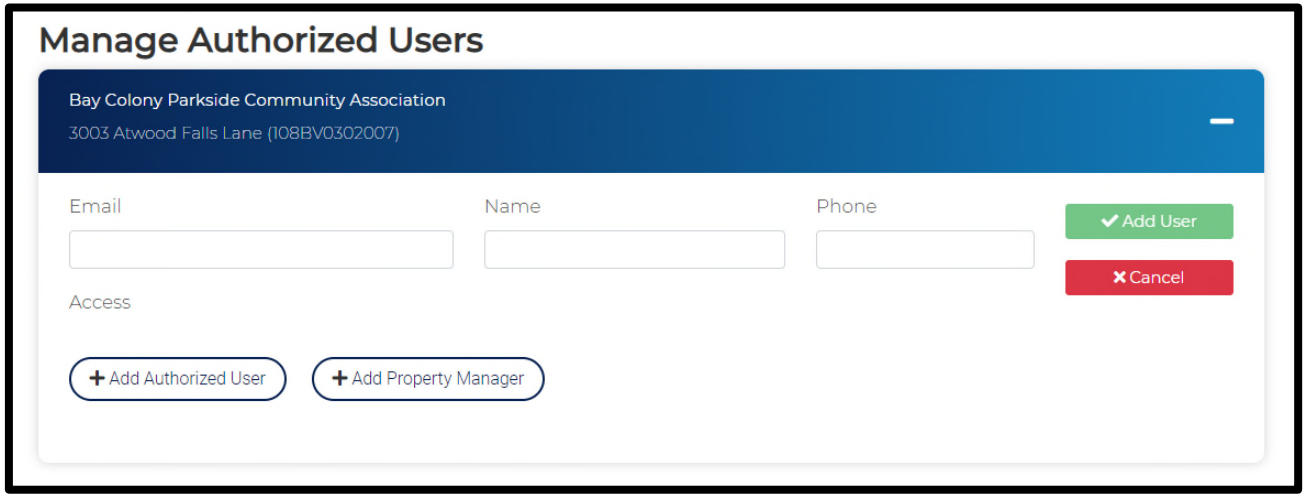
- From your dashboard, click on Manage Authorized Users.
  - If you own multiple homes, click on the home you want to work with to expand the dashboard.



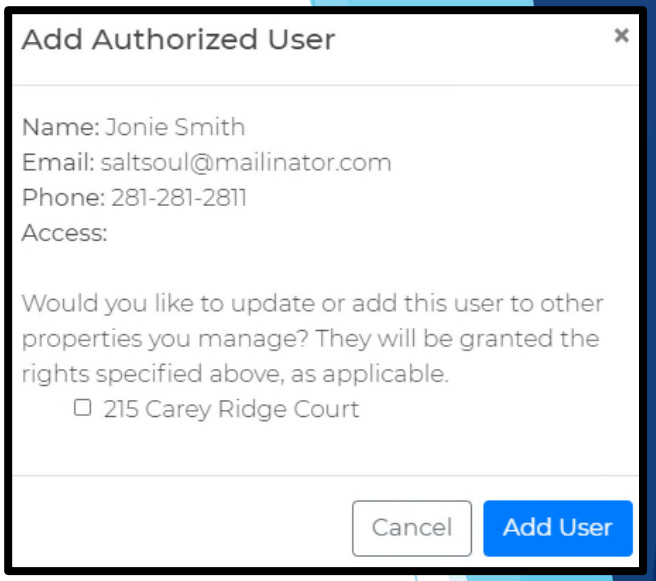
- Select Add Authorized User to add a family member, contractor, or tenant. You can customize what type of access each authorized user is given.



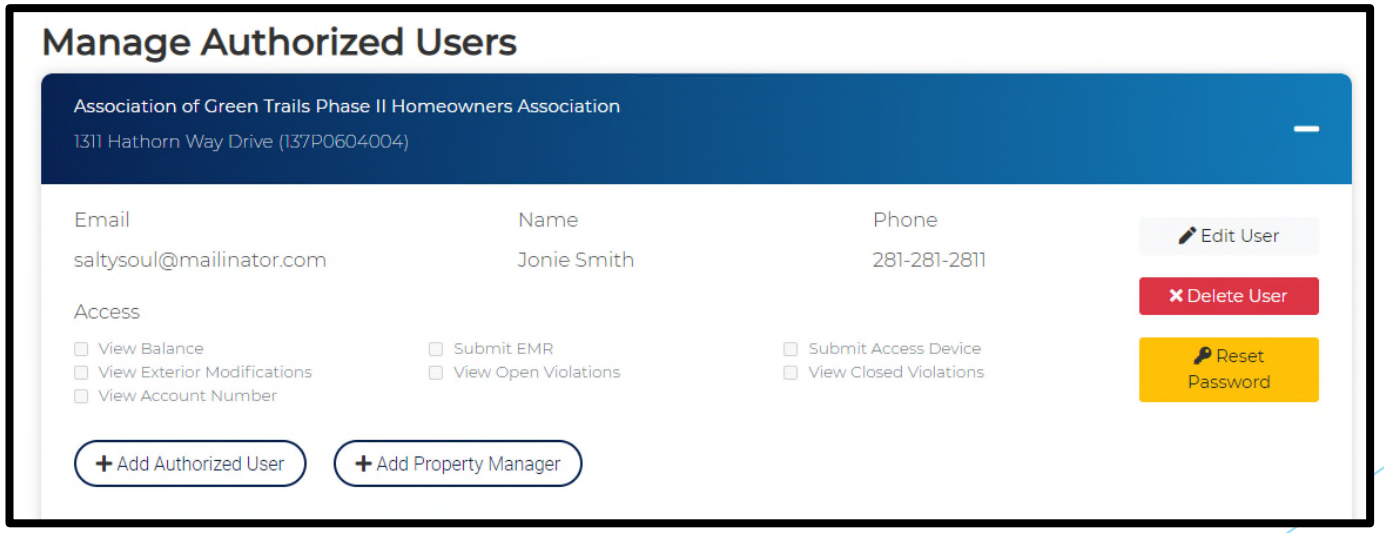
- Enter the Email, Name and Phone Number of the authorized user.
- Click Add User.



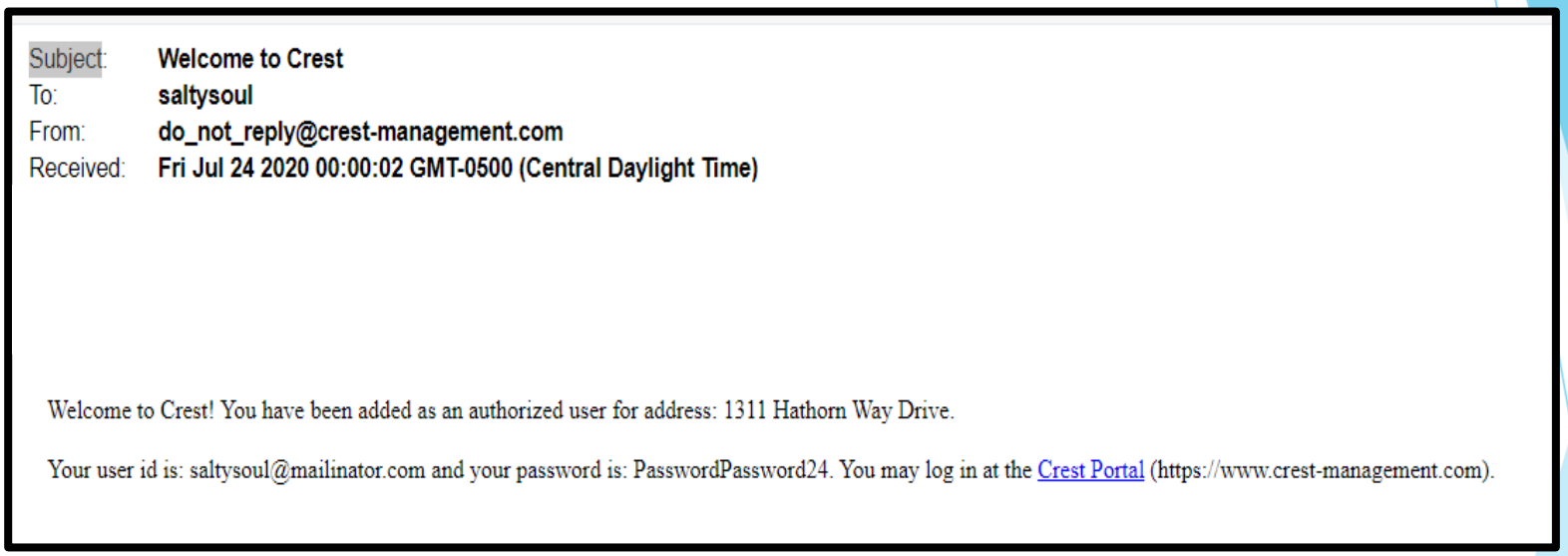
- If you have more than one home registered, you will be asked if you want to grant the authorized user access to other homes as well.



- Click Edit User.
- Select what the authorized user is permitted to access.
- Click Save User.



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

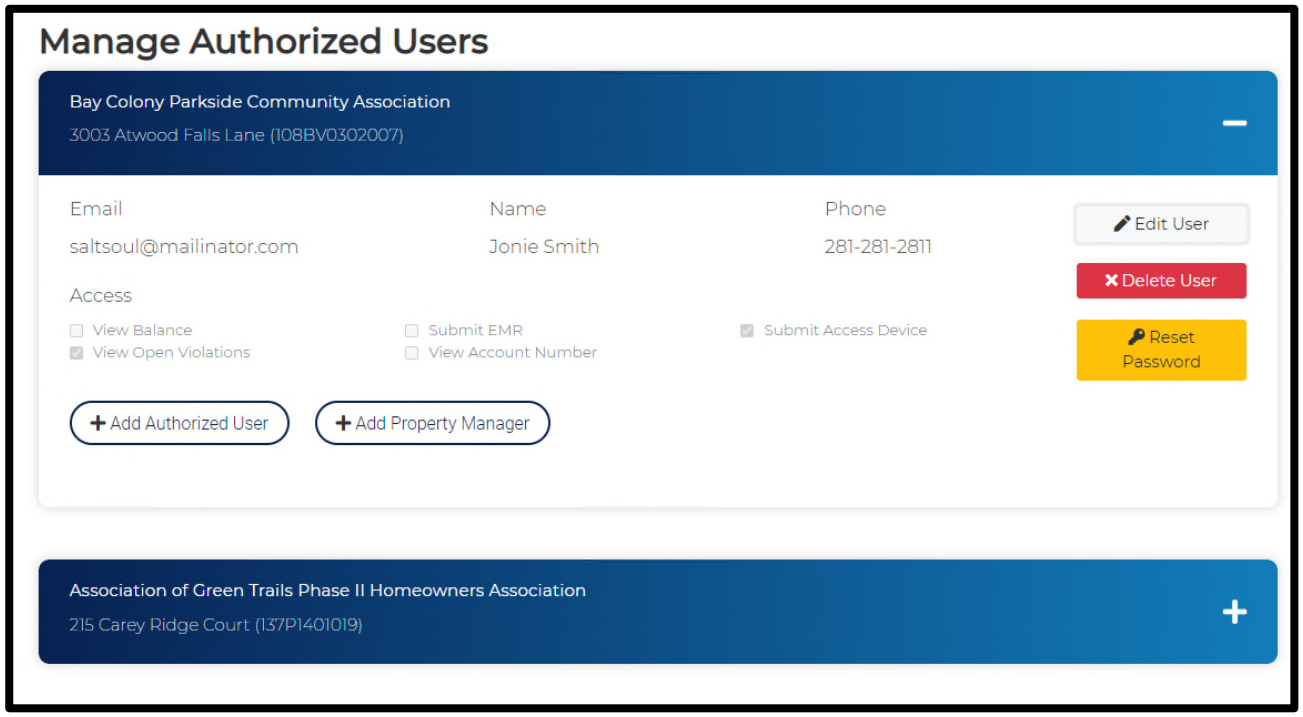


Subject: **Welcome to Crest**
To: **saltysoul**
From: **do_not_reply@crest-management.com**
Received: **Fri Jul 24 2020 00:00:02 GMT-0500 (Central Daylight Time)**

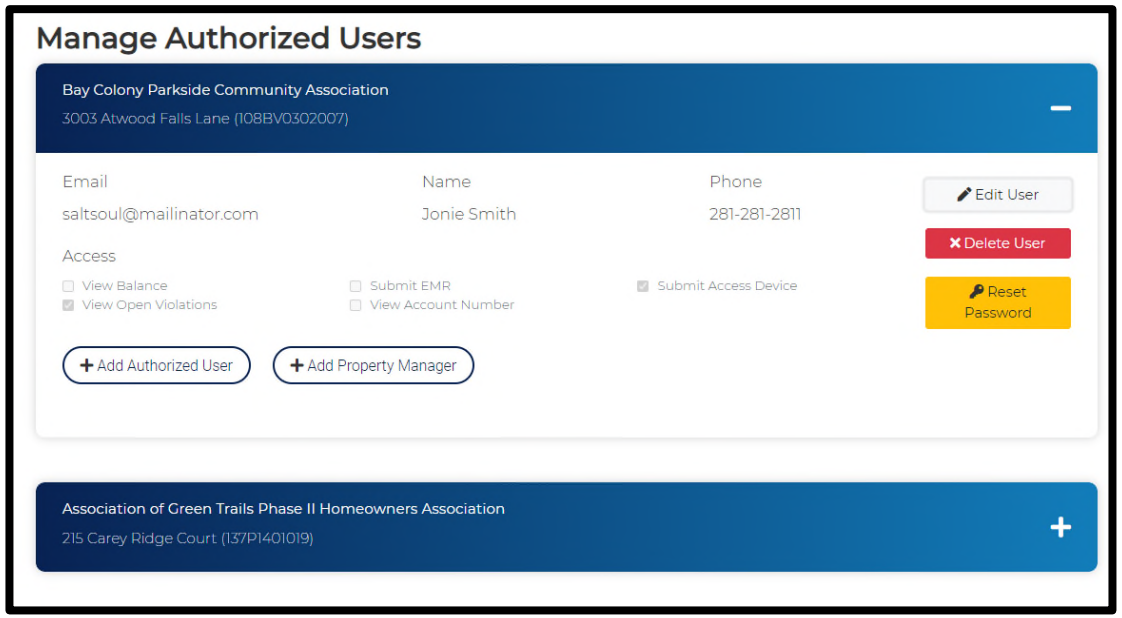
Welcome to Crest! You have been added as an authorized user for address: 1311 Hathorn Way Drive.

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).

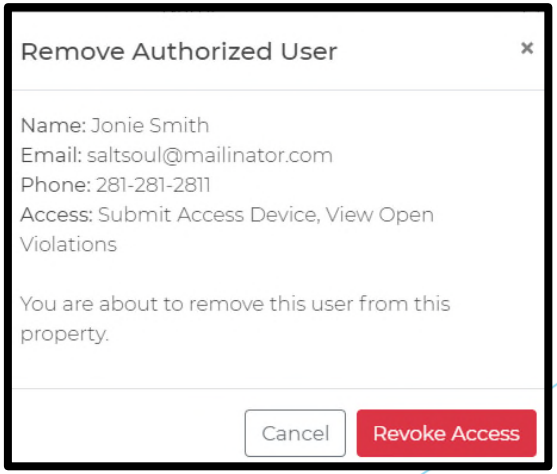
- Edit an authorized user by clicking Edit User. You can update the name, phone number, and what they are permitted to access.
  - The email address cannot be updated. If the authorized user's email has change, you must delete the user and add them as a new authorized user.
- Click Save User.



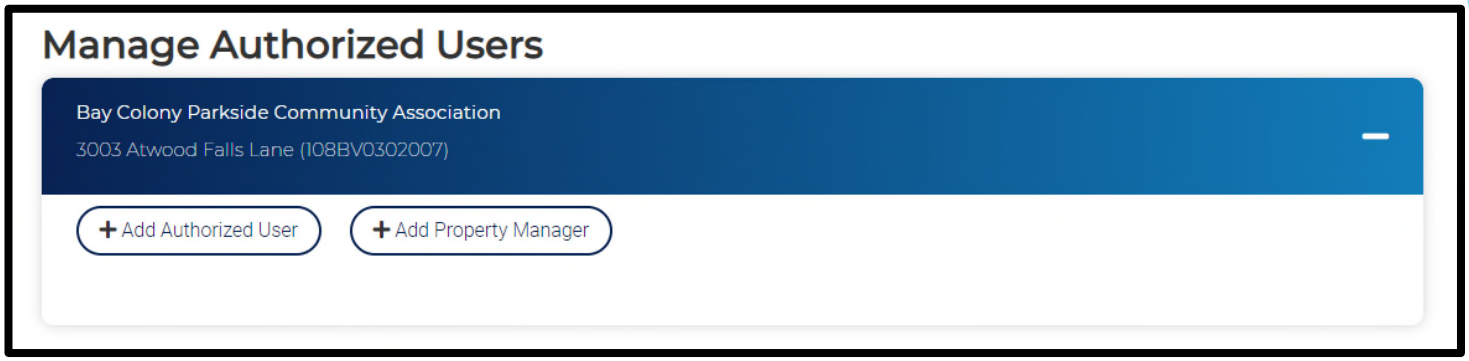
- To delete an authorized user, click Delete User.



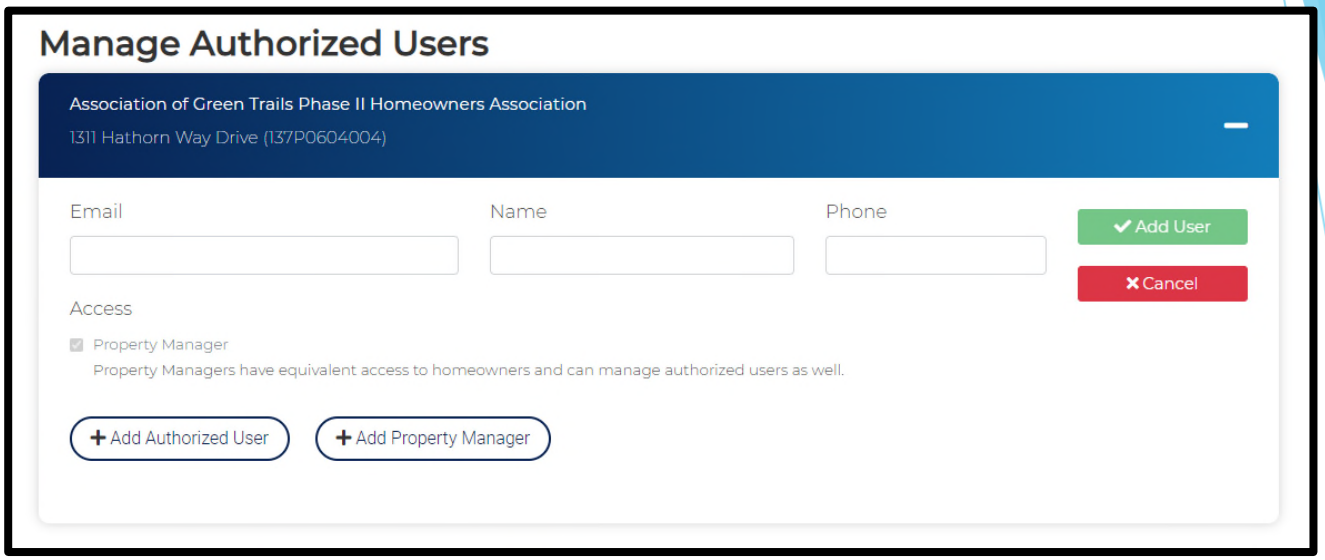
- Click Revoke Access.



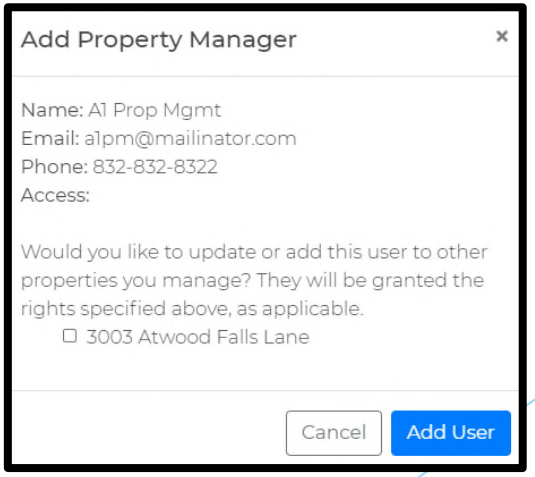
- Select Add Property Manager if you have hired a property manager to act on your behalf. Property managers are granted full access to the account and can also manage authorized users.



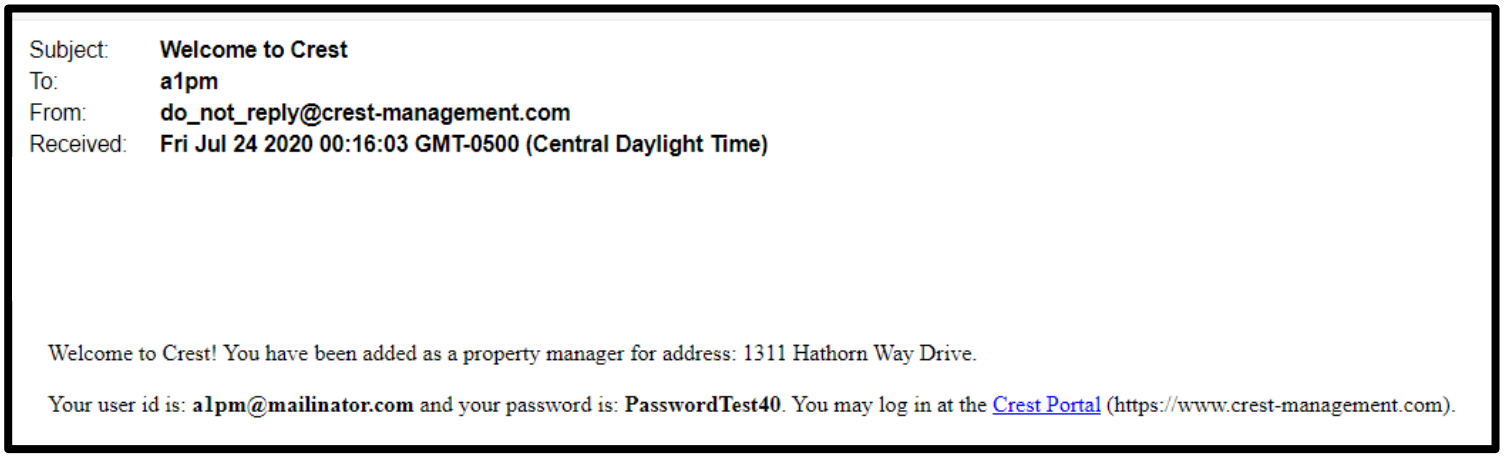
- Enter the Email, Name and Phone Number of the property manager.
- Click Add User.



- 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.

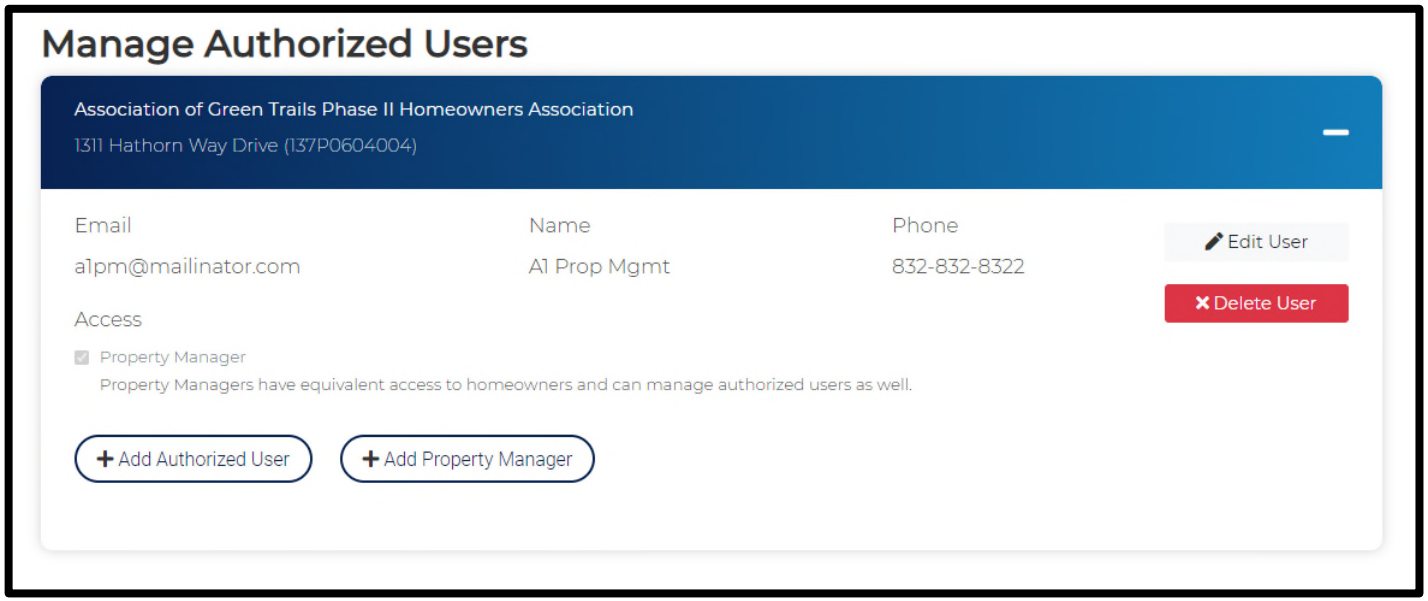


- The property manager will receive an email containing their log in information.



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).

- 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.