Homeowner Portal User Guide

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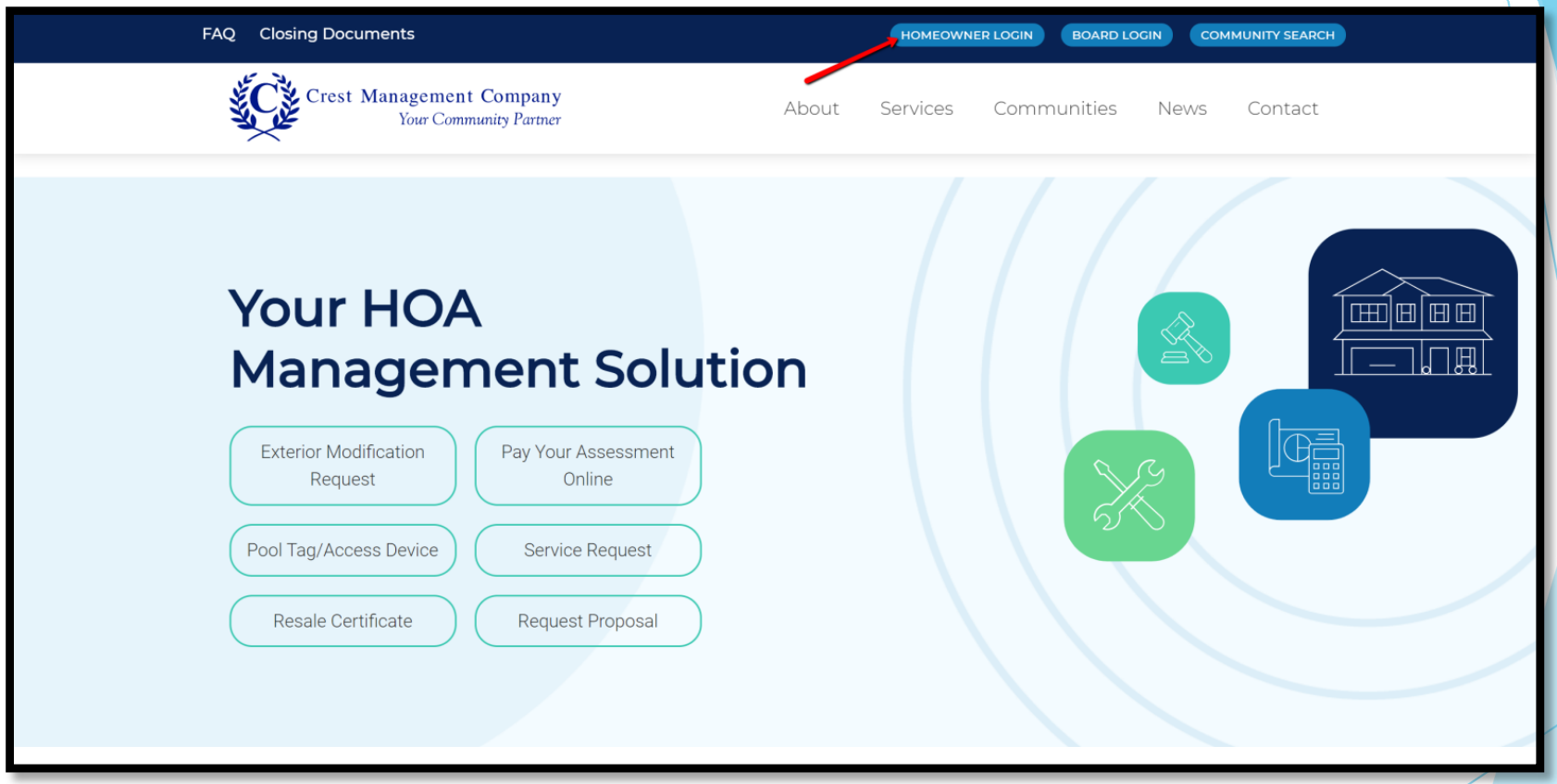
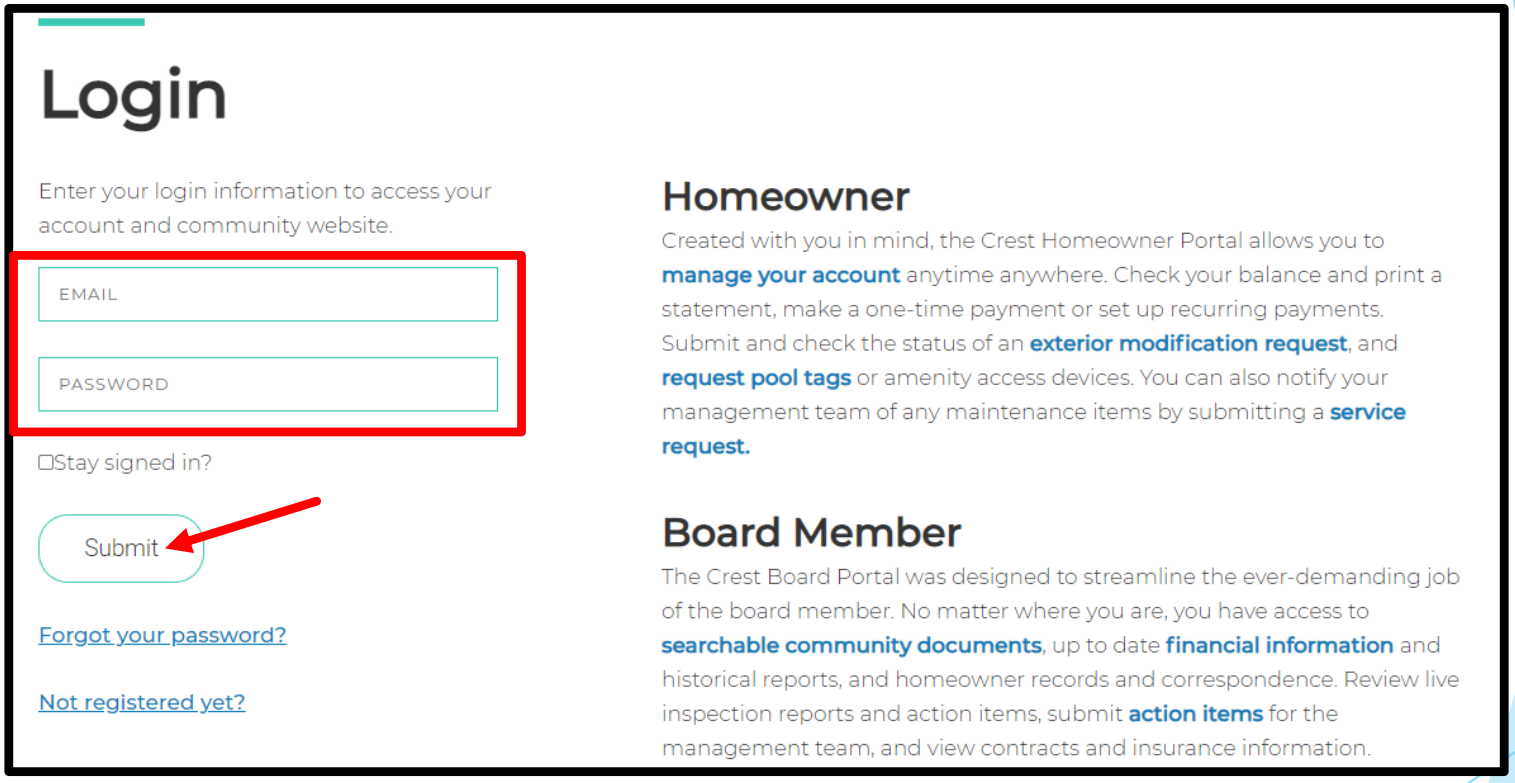
User Settings

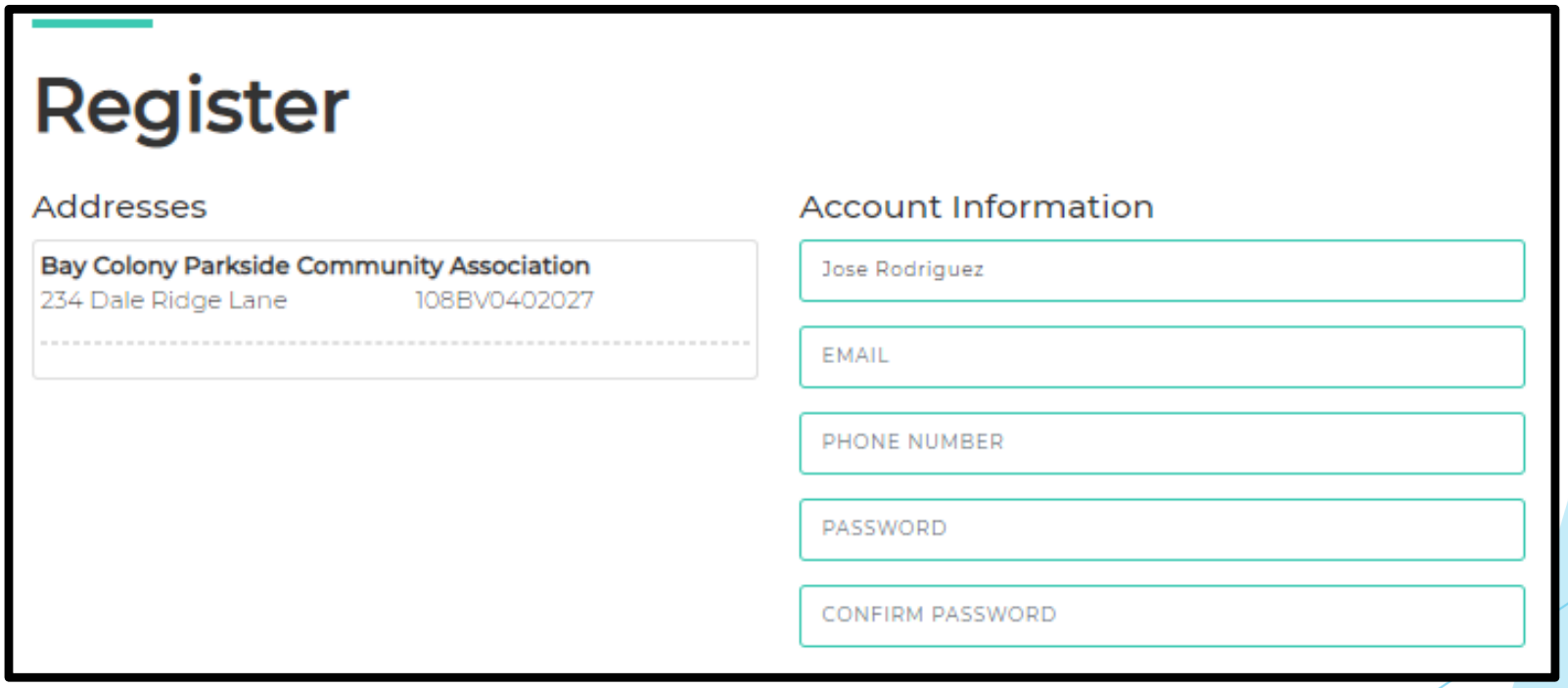
- Go to www.crest-management.com and click on Homeowner Login.



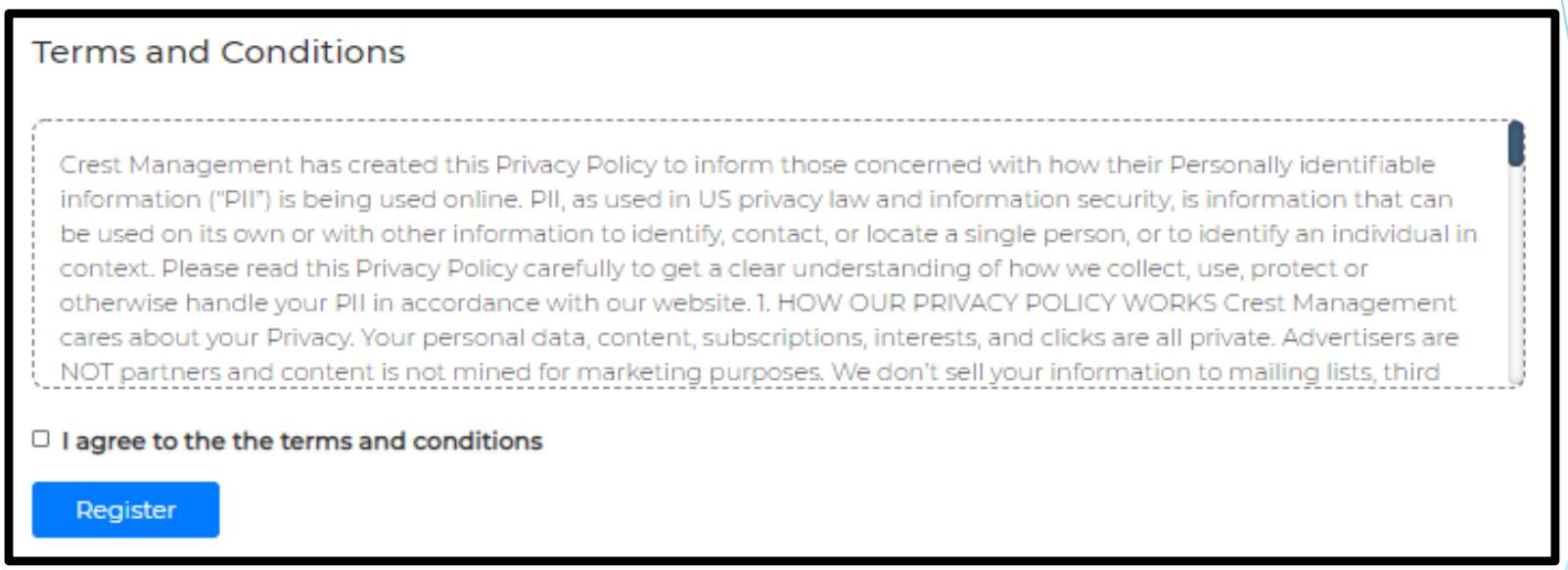
- Enter your email and the temporary password you received.
- Click Submit.



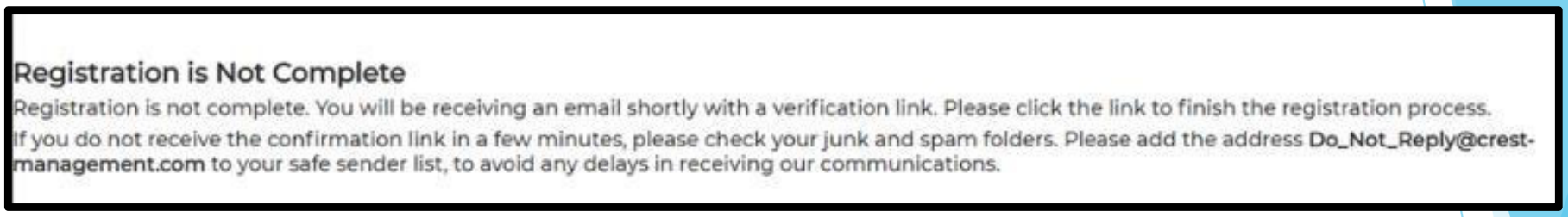
- Your name and address will be prefilled.
- Enter your email and phone number.
- Enter the password of your choice.
- Confirm the password by entering it again.



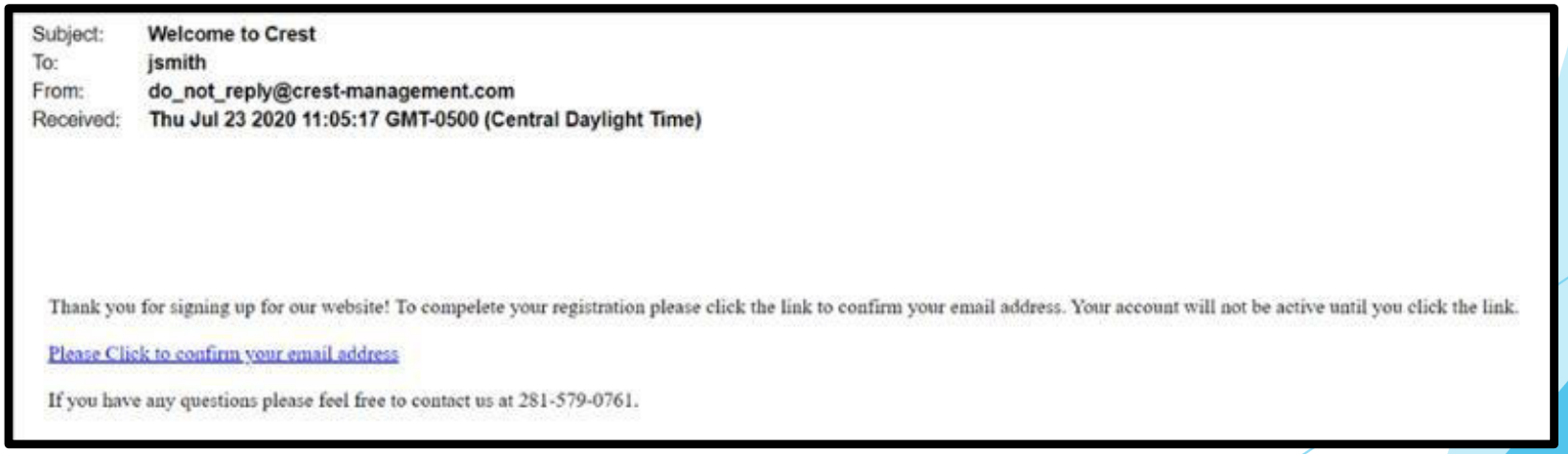
- Review the Terms and Conditions and check the box to acknowledge your acceptance.
- Click Register.



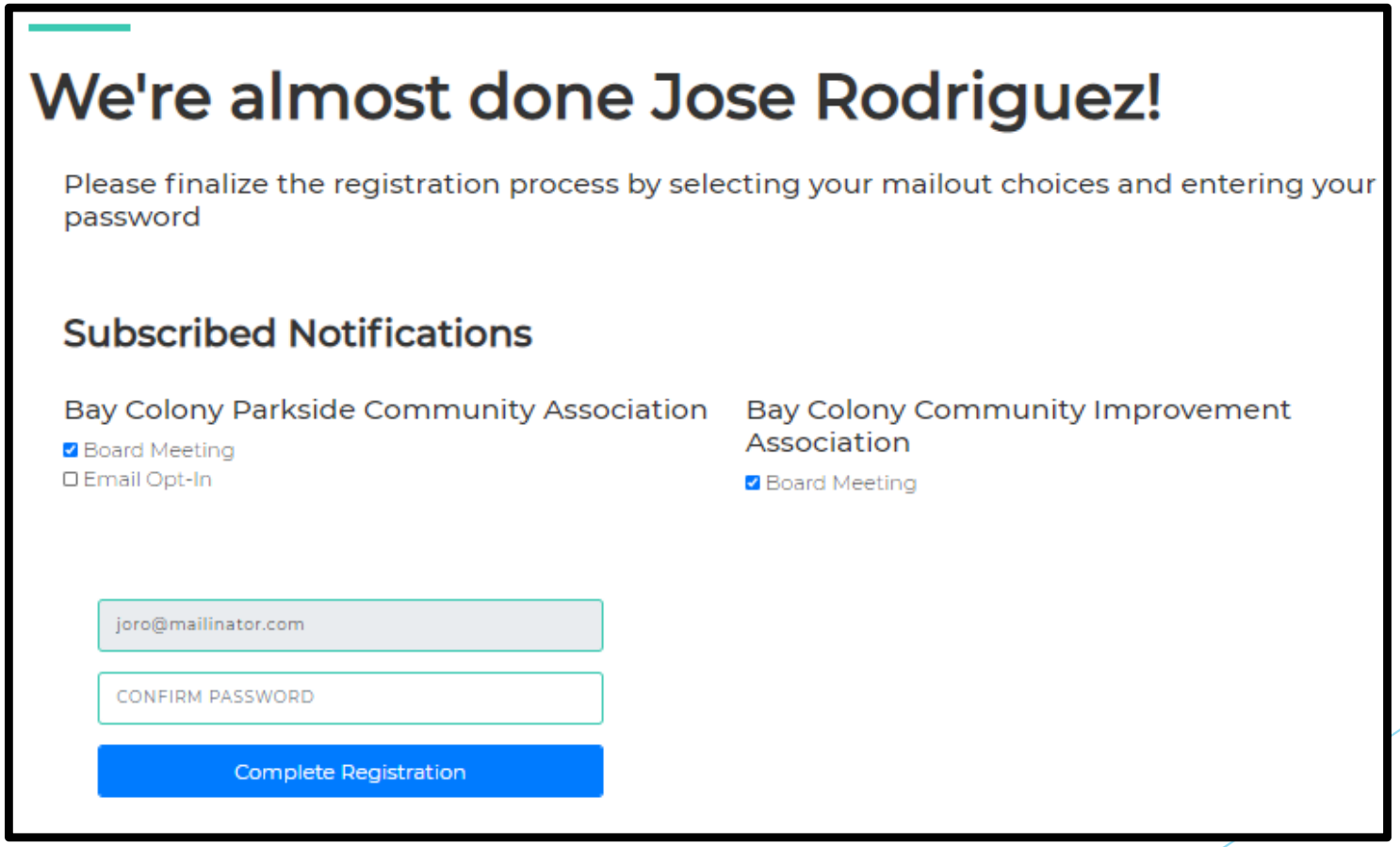
- An advisory message will appear stating that as a final precaution, a verification link will be sent to your email.



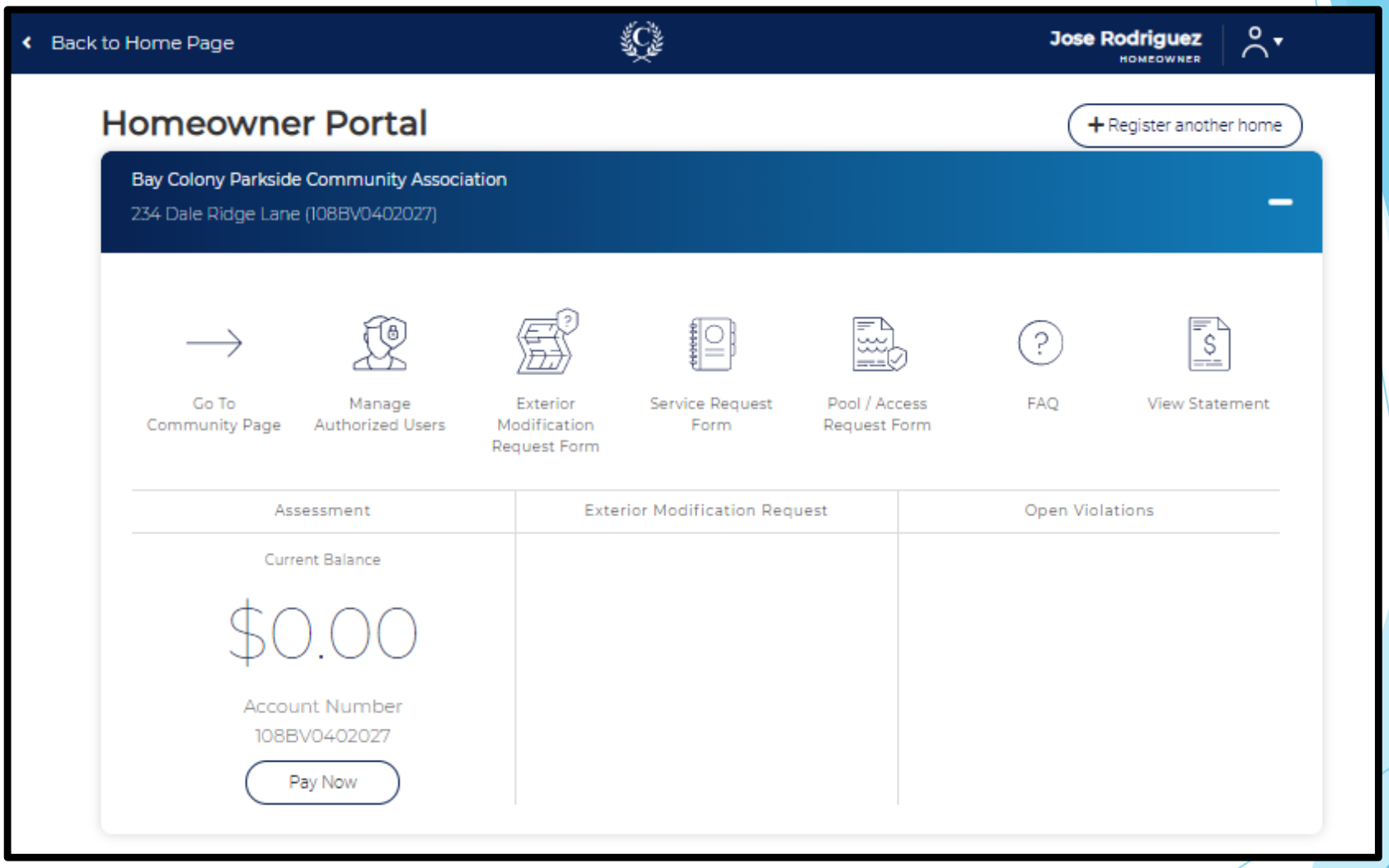
- Once you receive the verification email, click the link to confirm your email address.



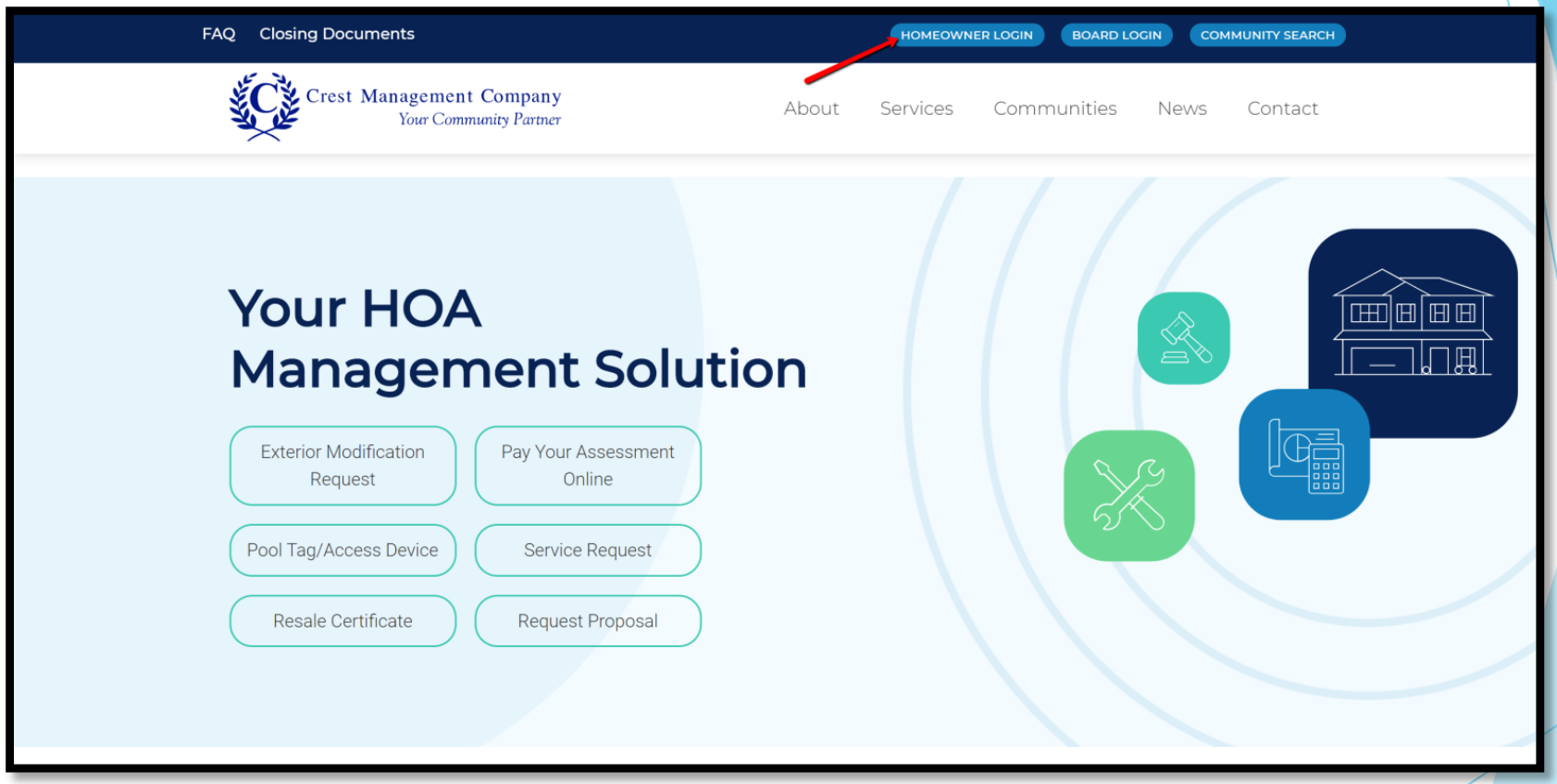
- Select the categories for which you want to receive emails. *(Category options will differ by community.)*
- Enter the password you selected.
- Click Complete Registration.



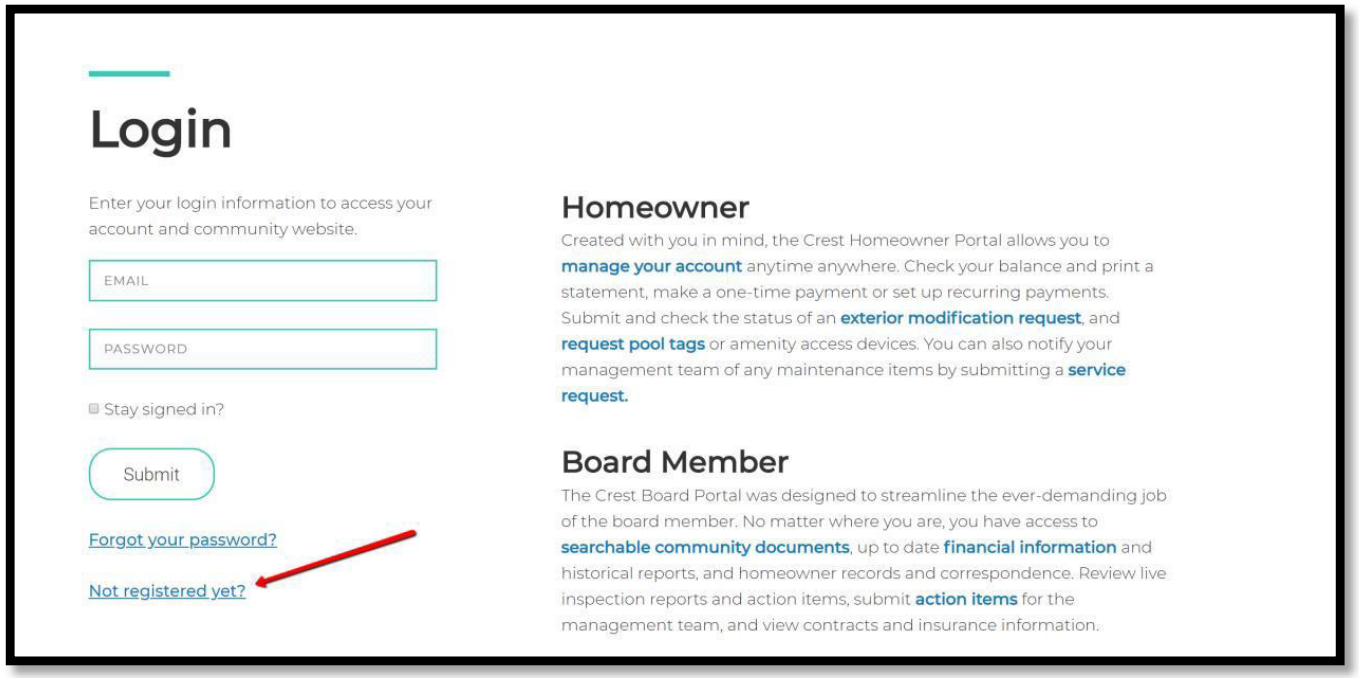
- Welcome to your Homeowner Dashboard!



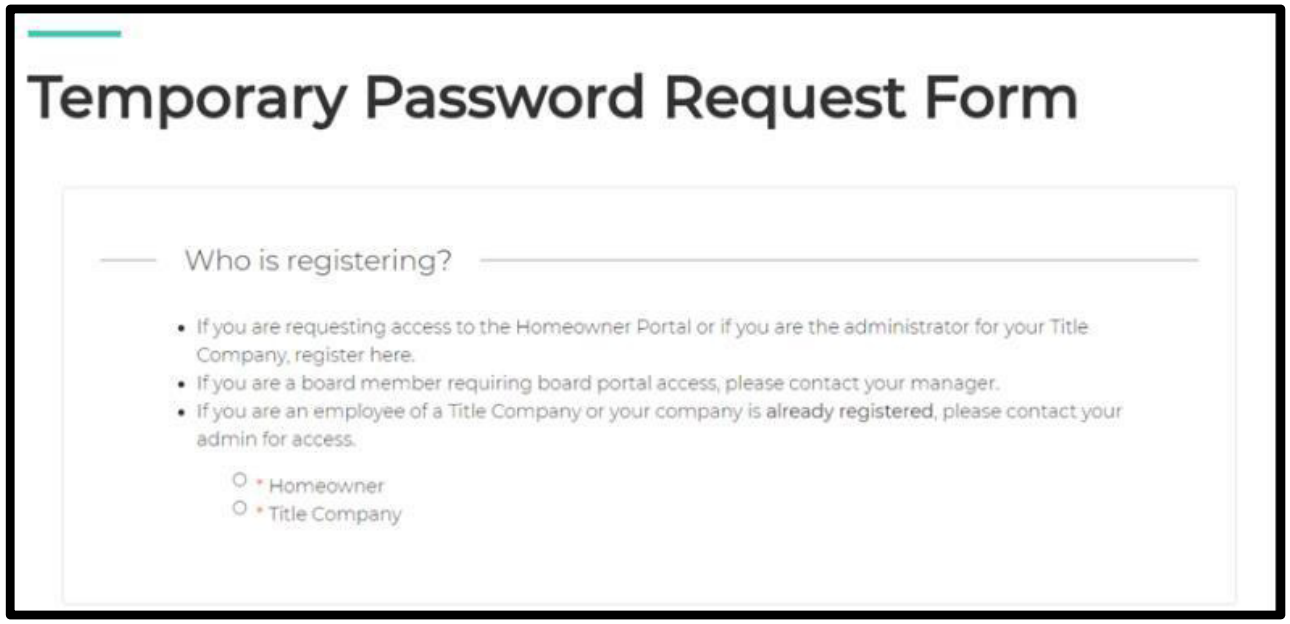
- Go to www.crest-management.com and click on Homeowner Login.



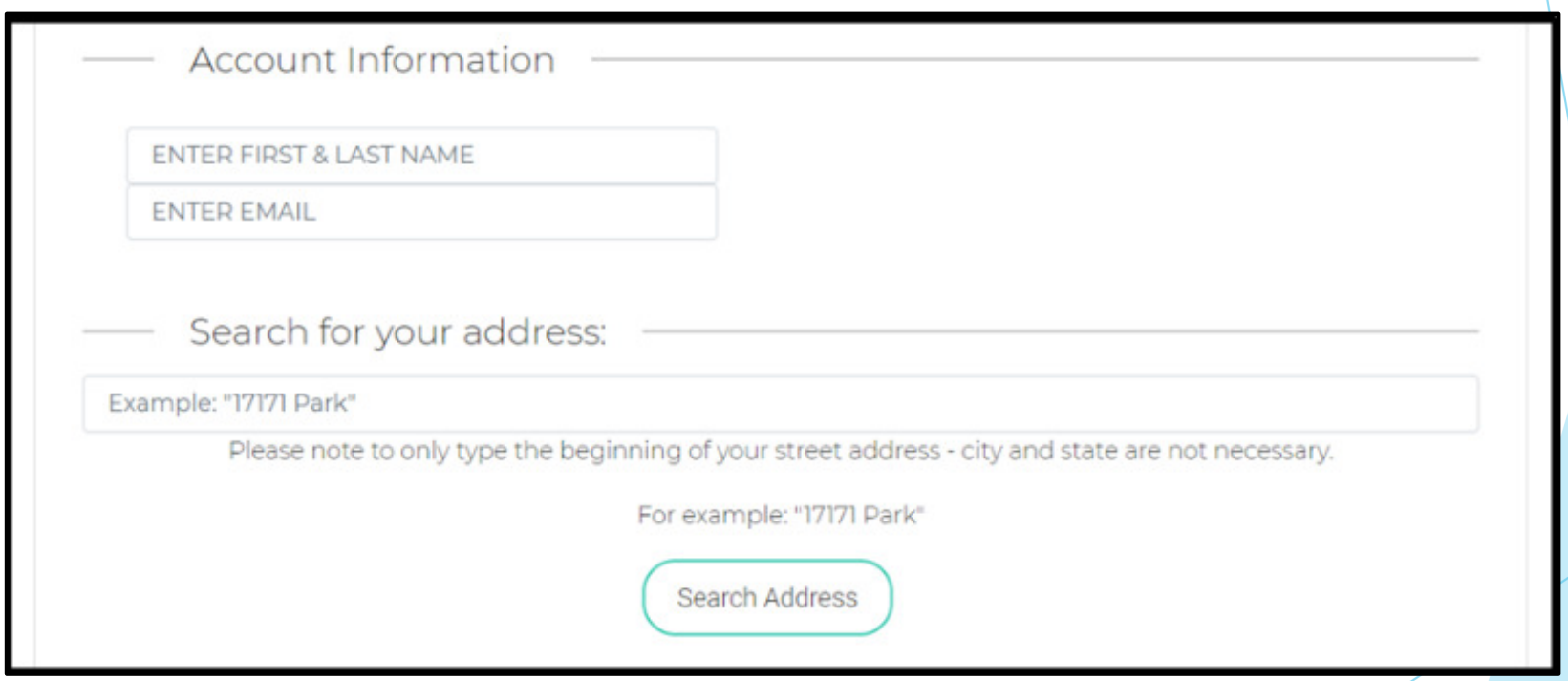
- Click on Not Registered Yet?



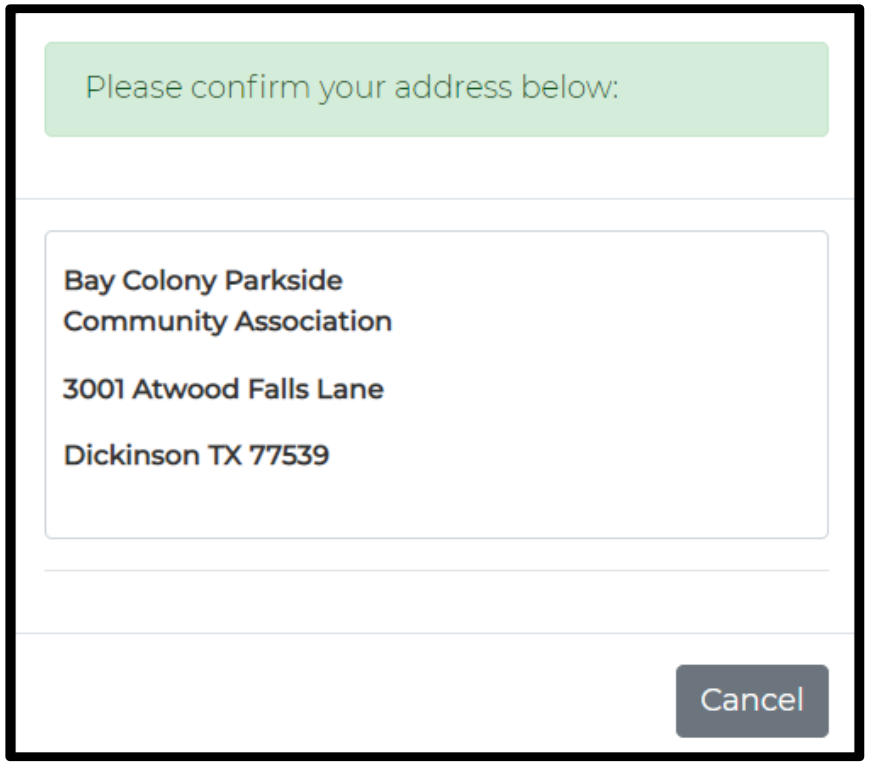
- Select whether you are a Homeowner or Title Company
- Click Continue.



- 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.

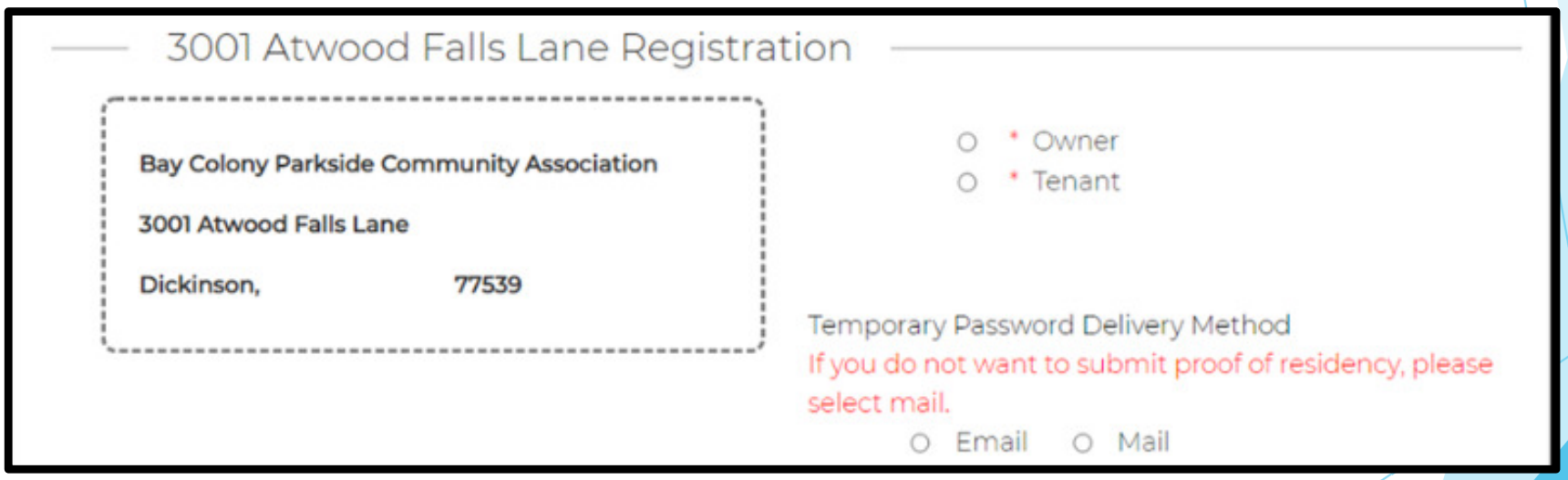


- Click on your address to proceed. If your address is not shown, click Cancel to go back.

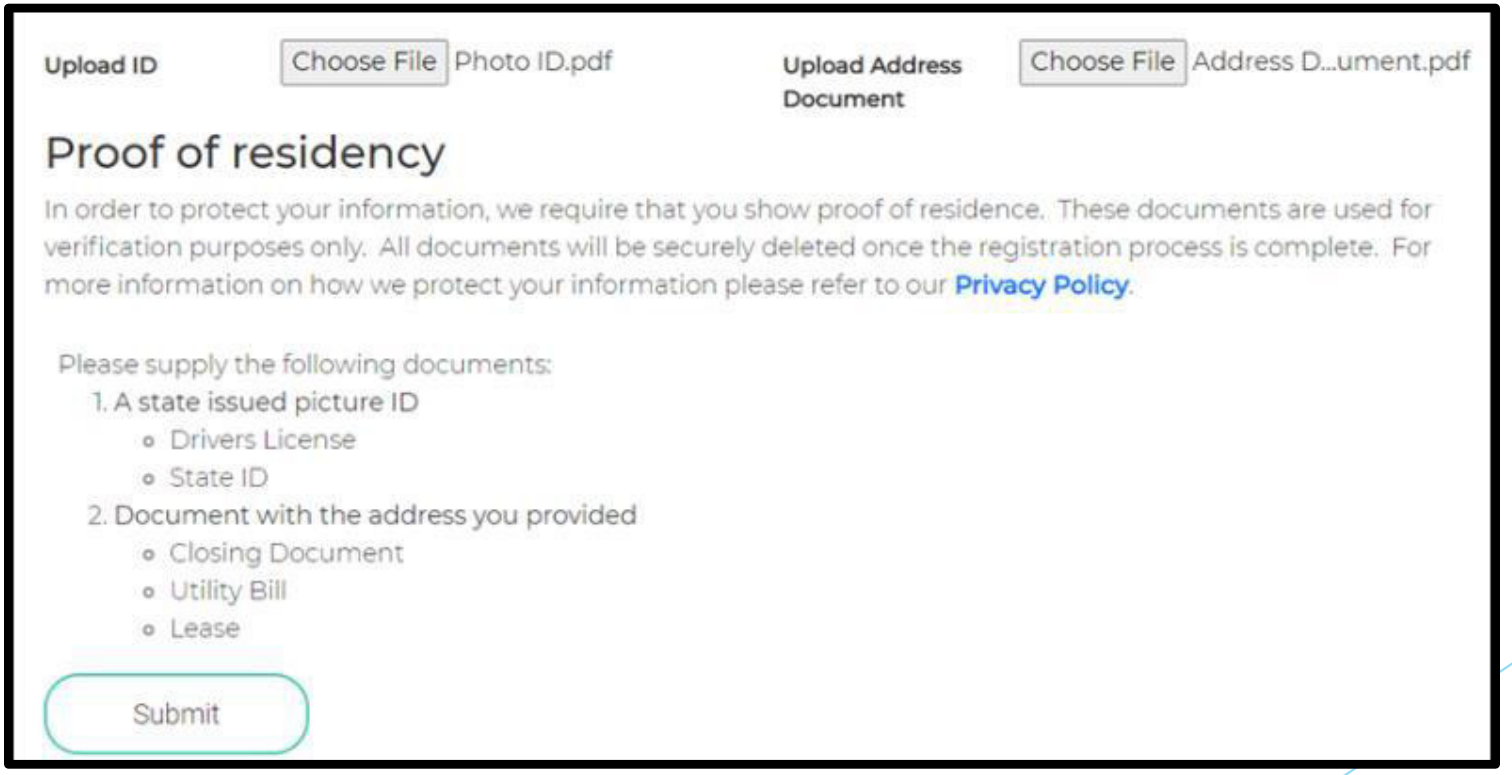


- If you own more than one home, you can continue to search for the addresses one by one and add them to the registration.

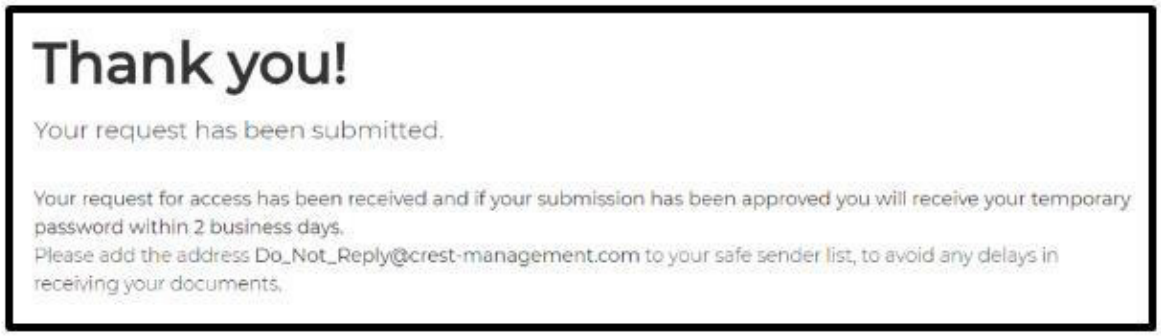
- Select whether you are an Owner or Tenant.
- Select whether you want to receive your temporary password by email or mail. *To receive it by email, you are required to upload two proof of residency documents including a state-issued photo ID and an additional document listing your name and property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

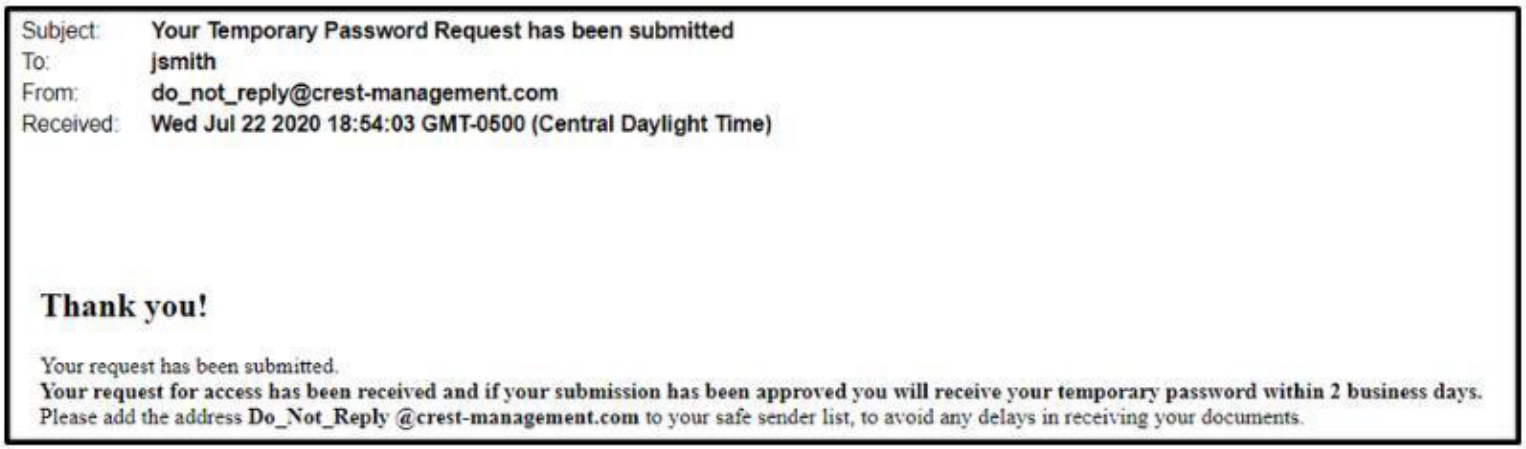


- If you chose to receive your password by email, click Choose File to find and select your documents. Make sure to upload separate documents to the Upload ID and Upload Address Document fields.
- If you chose to receive your password by mail, the upload fields will not be present.
- Click Submit.



- 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)**

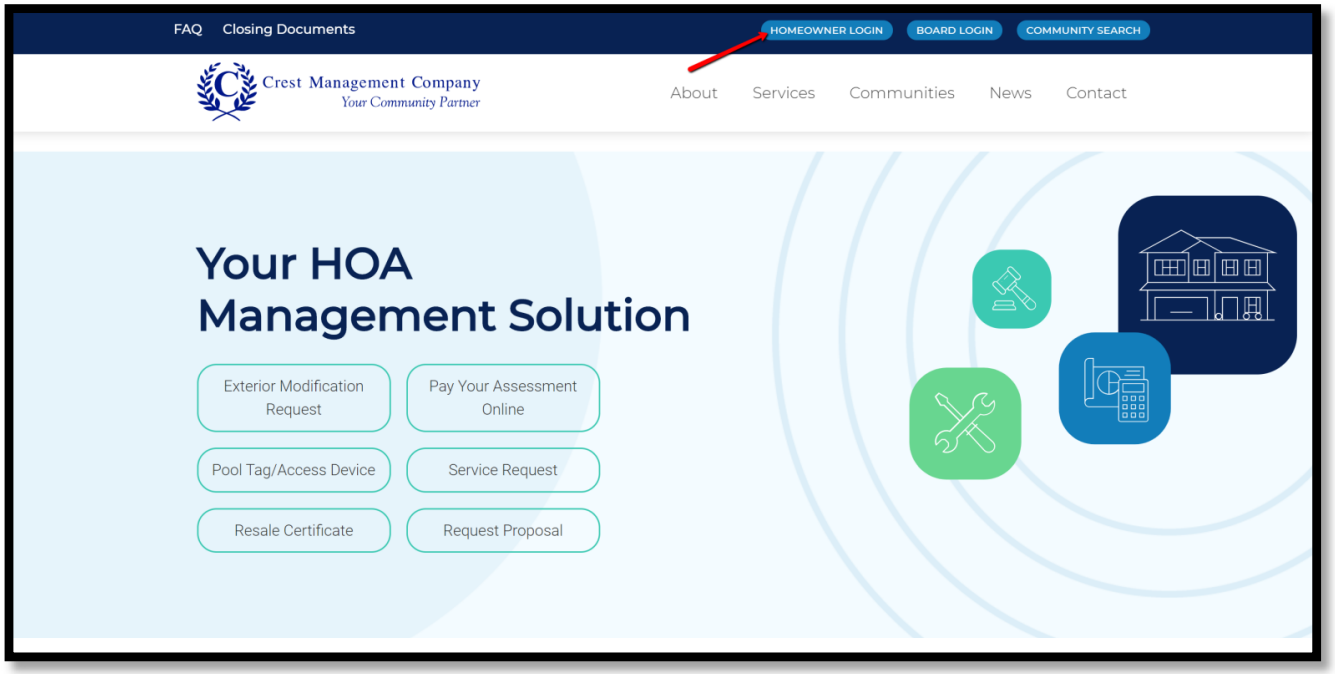
Bay Colony Parkside Community Association

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

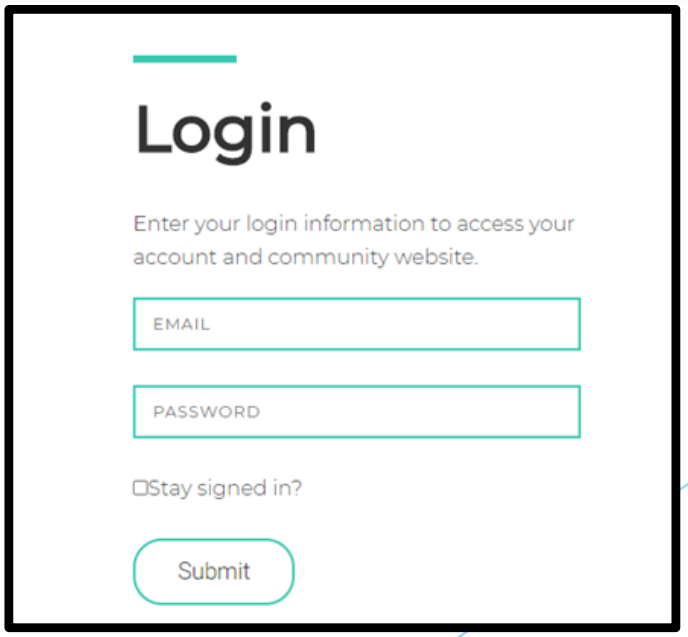
Temporary Password: TestPassword71

Registering Without a Temporary Password

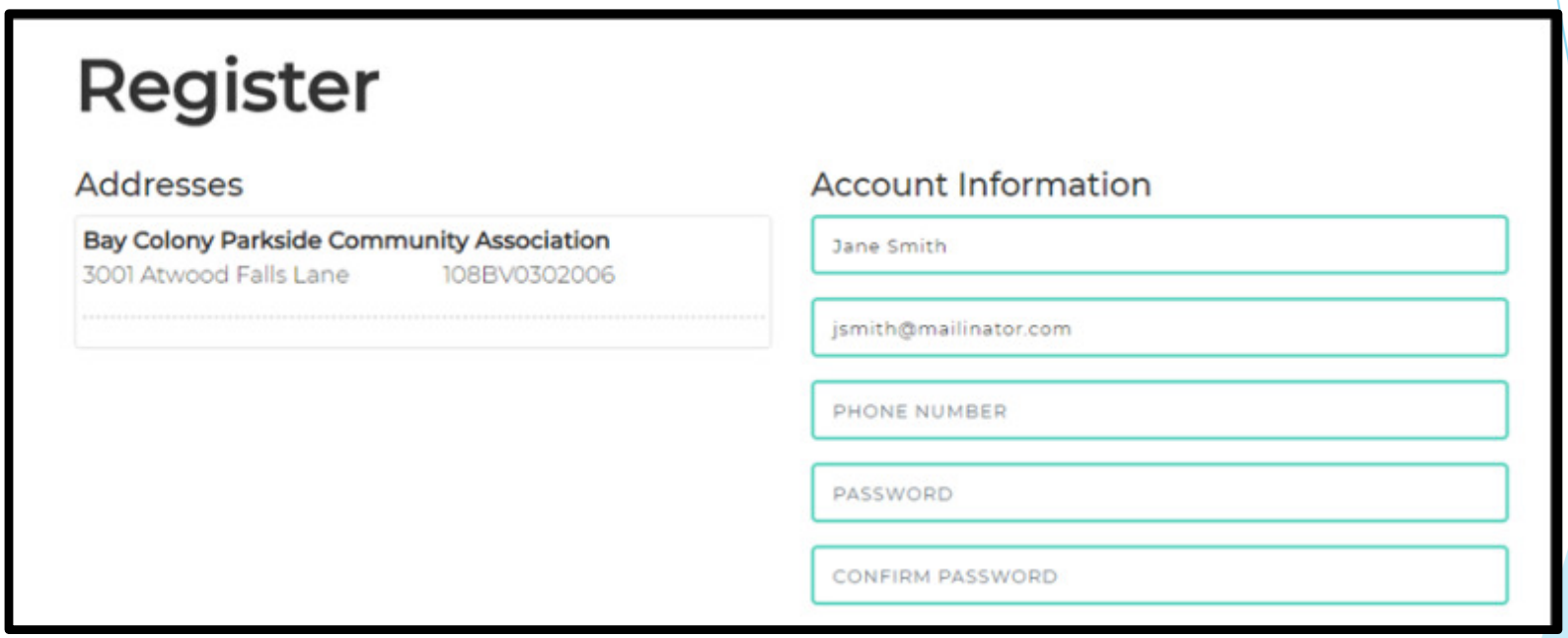
- Go to www.crest-management.com and click on Homeowner Login.



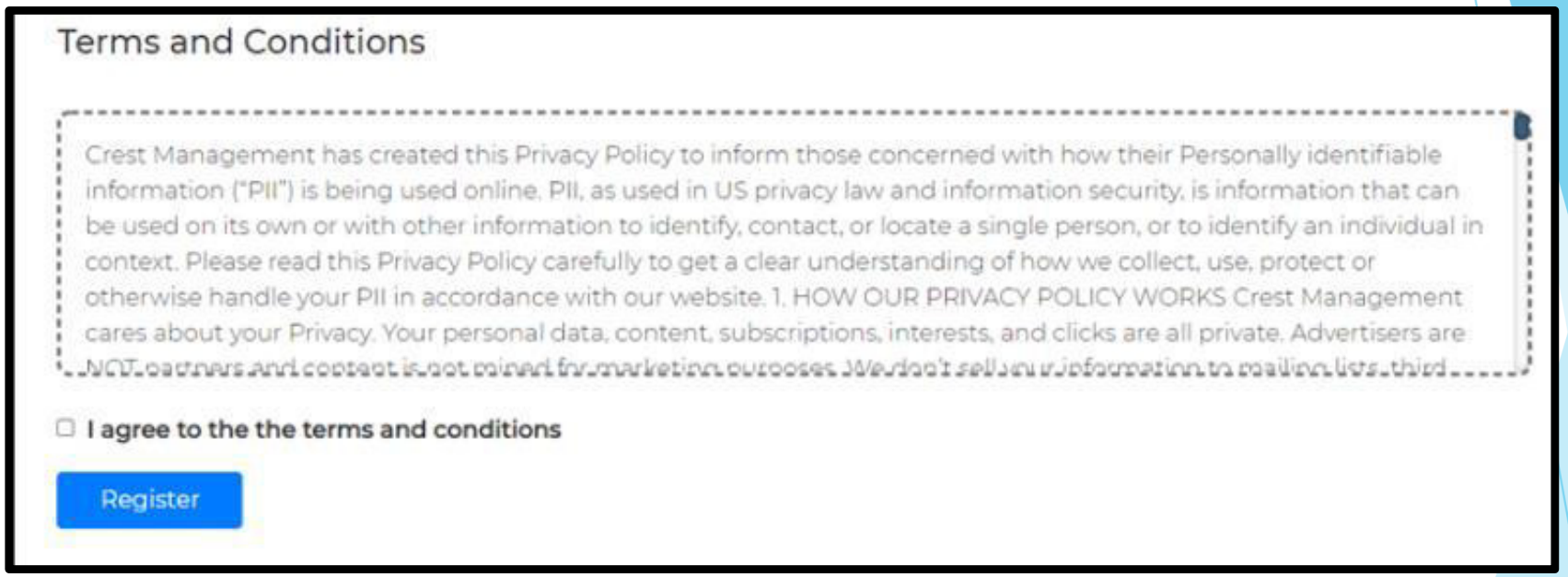
- Enter your email.
- Enter the temporary password you received.
- Click Submit.



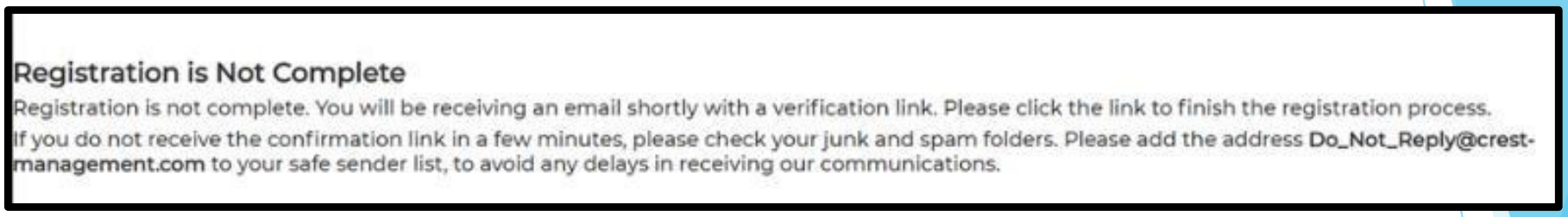
- Your name and address will be prefilled.
- Enter your phone number.
- Enter the password of your choice.
- Confirm the password by entering it again.



- 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.

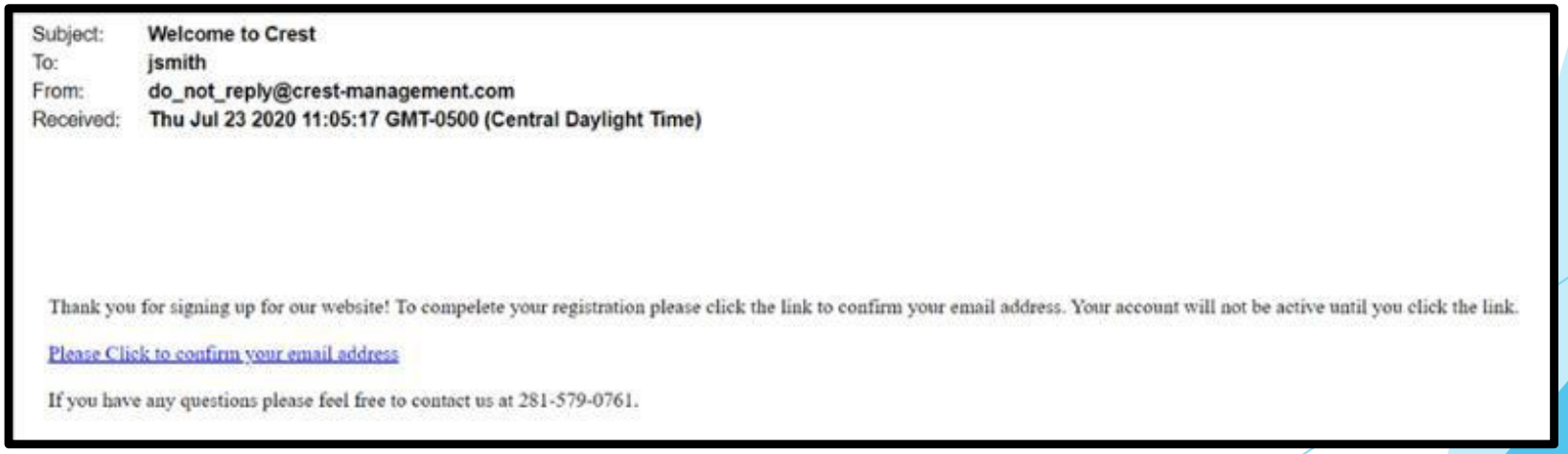


Registration is Not Complete

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.



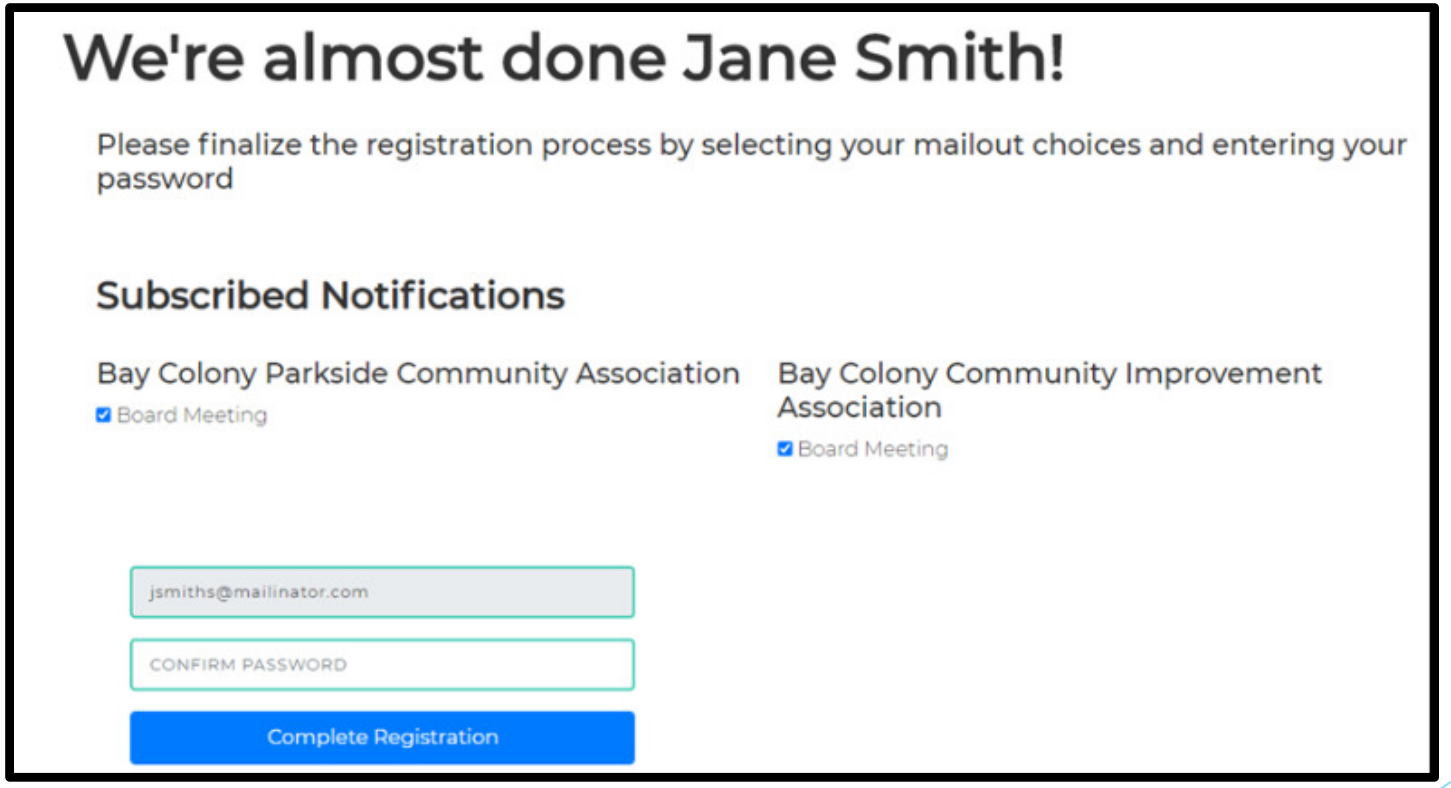
Subject: **Welcome to Crest**
To: **jsmith**
From: **do_not_reply@crest-management.com**
Received: **Thu Jul 23 2020 11:05:17 GMT-0500 (Central Daylight Time)**

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.

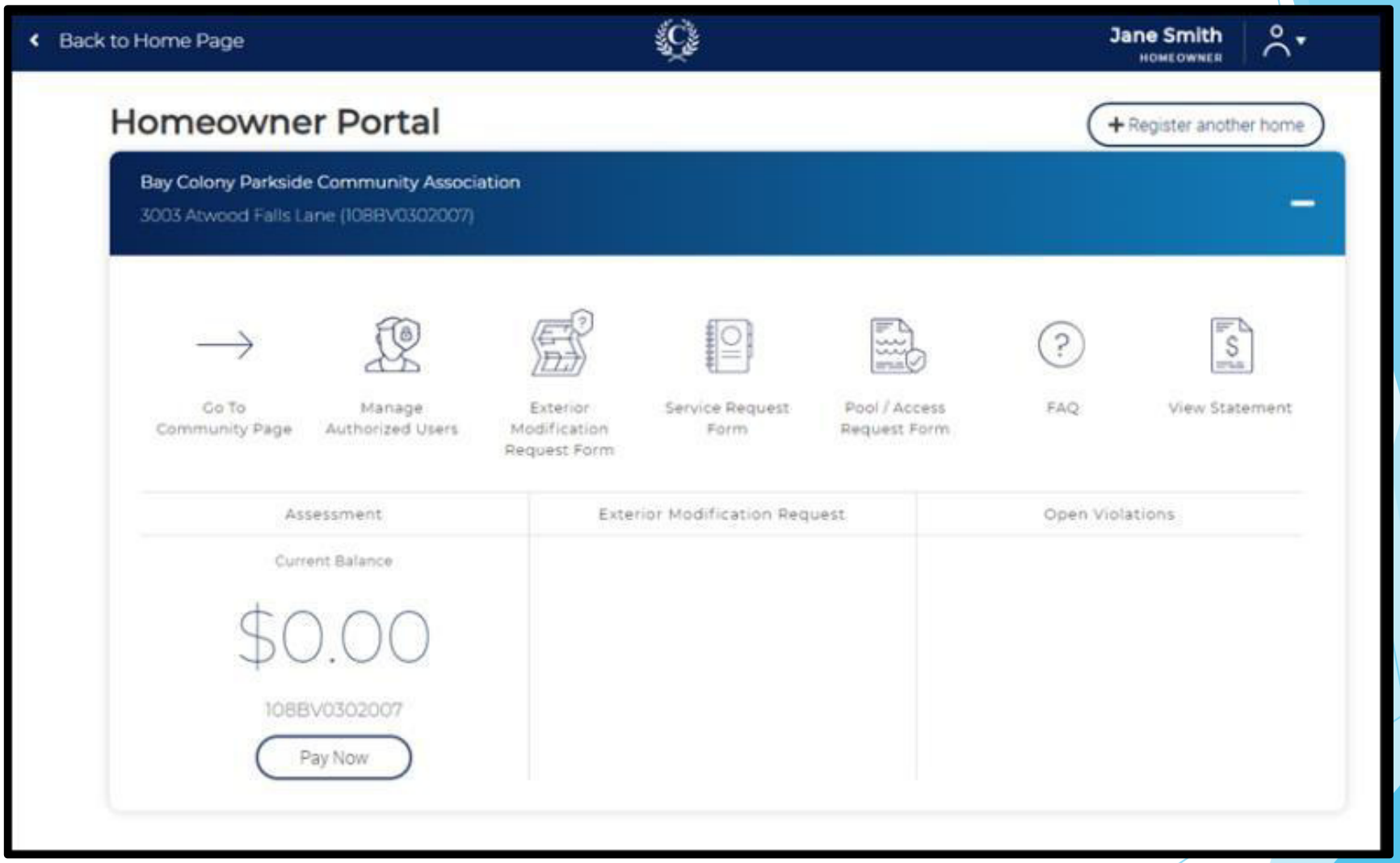
Please Click to confirm your email address

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

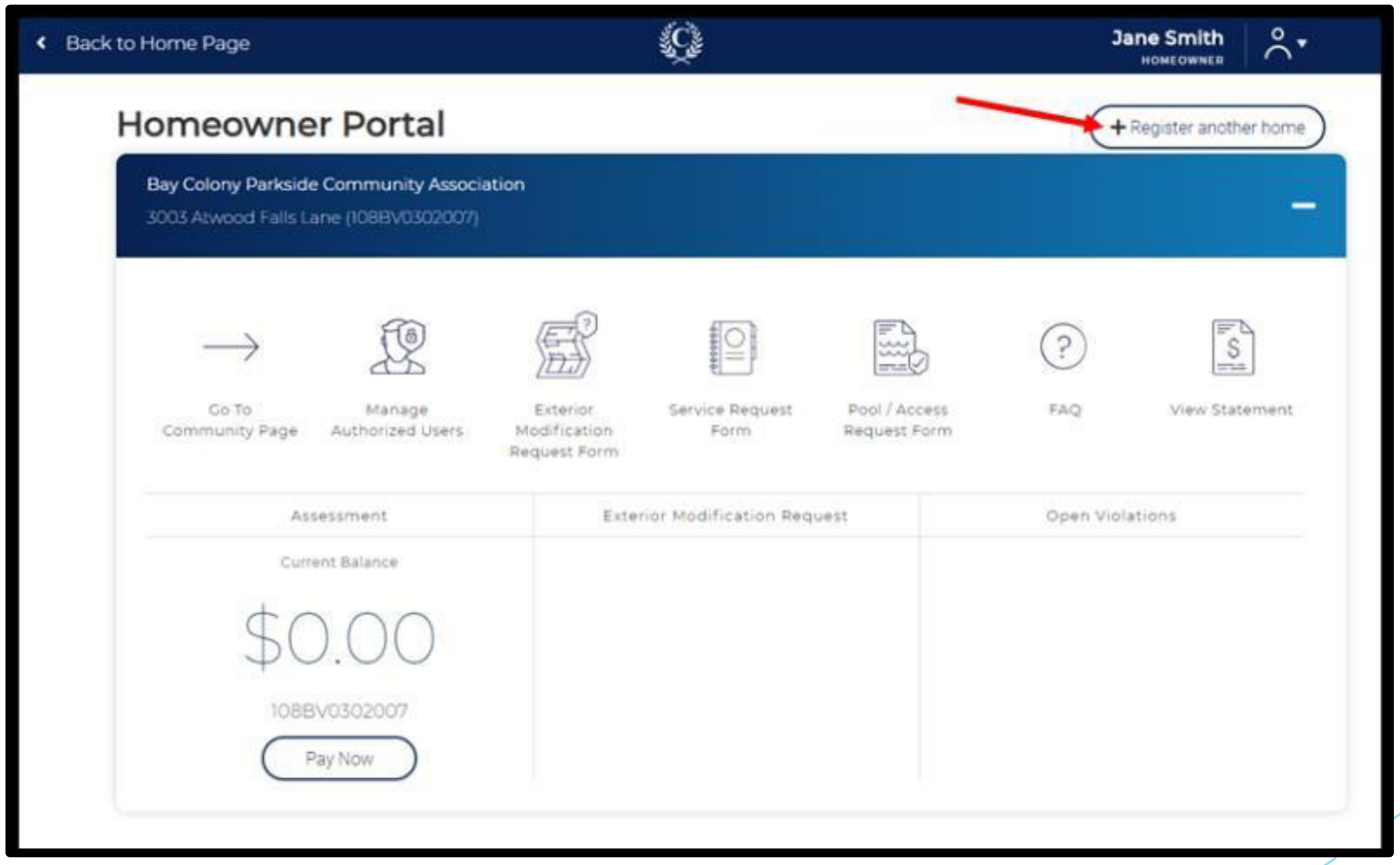
- Select the categories for which you want to receive emails.
- Enter the password you selected.
- Click Complete Registration.



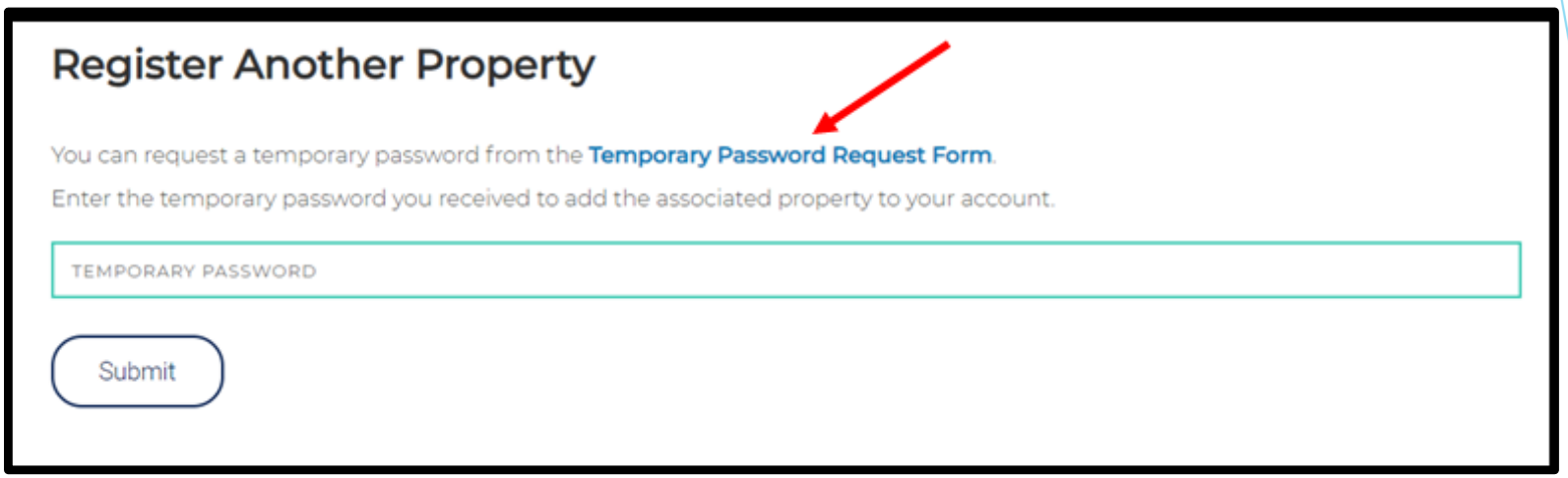
- Welcome to your Homeowner Dashboard!



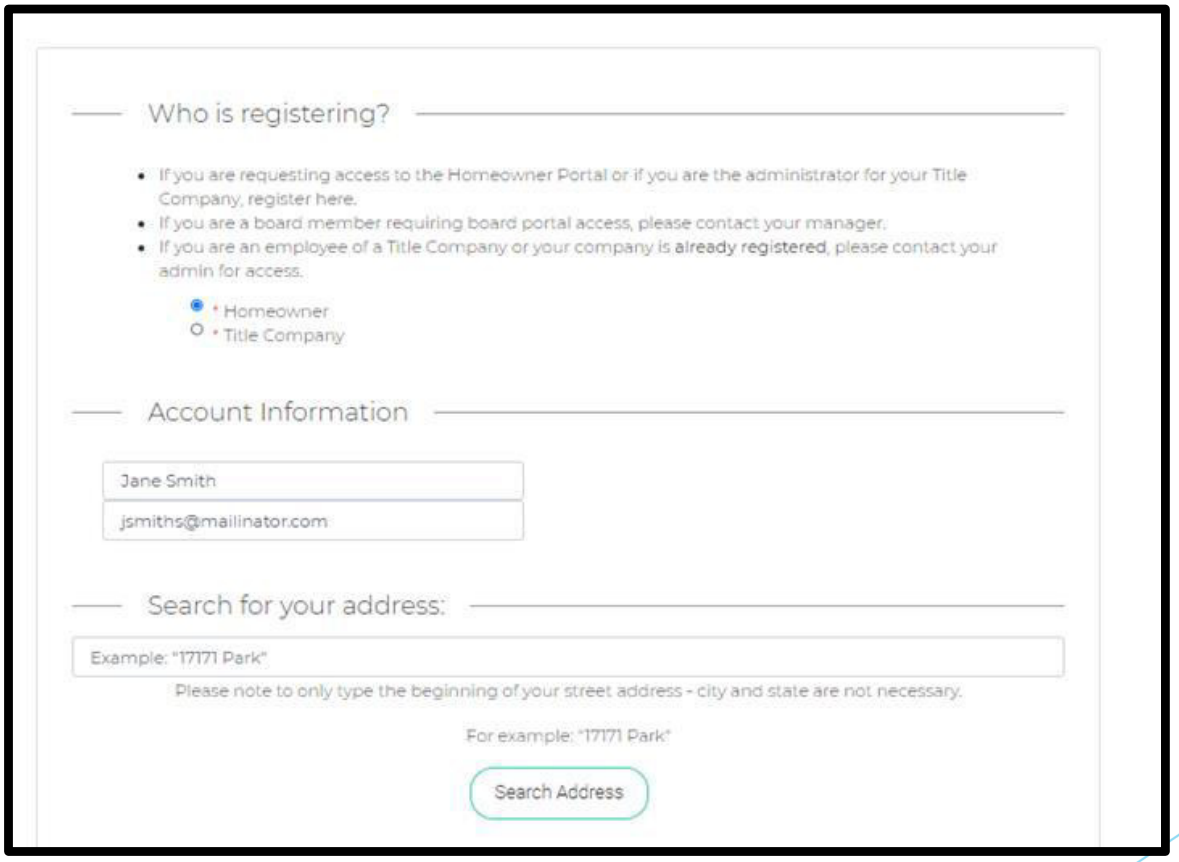
- If you are a homeowner or investor that owns more than one home in Crest-managed communities, you may add all homes to the same registration.
- Log in to your account and from your dashboard, click Register Another Home.



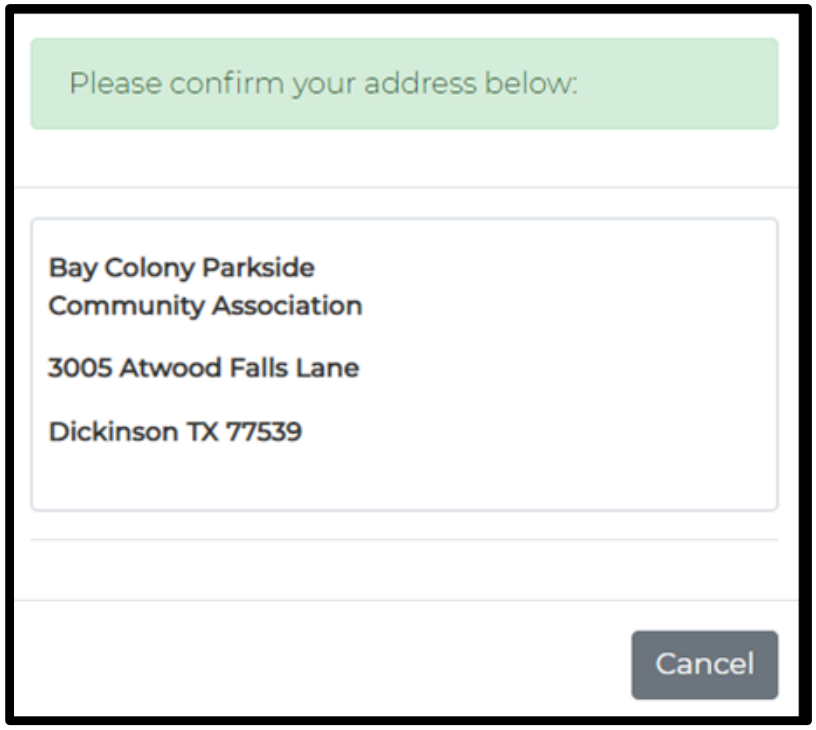
- Click the Temporary Password Request Form link.



- 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.

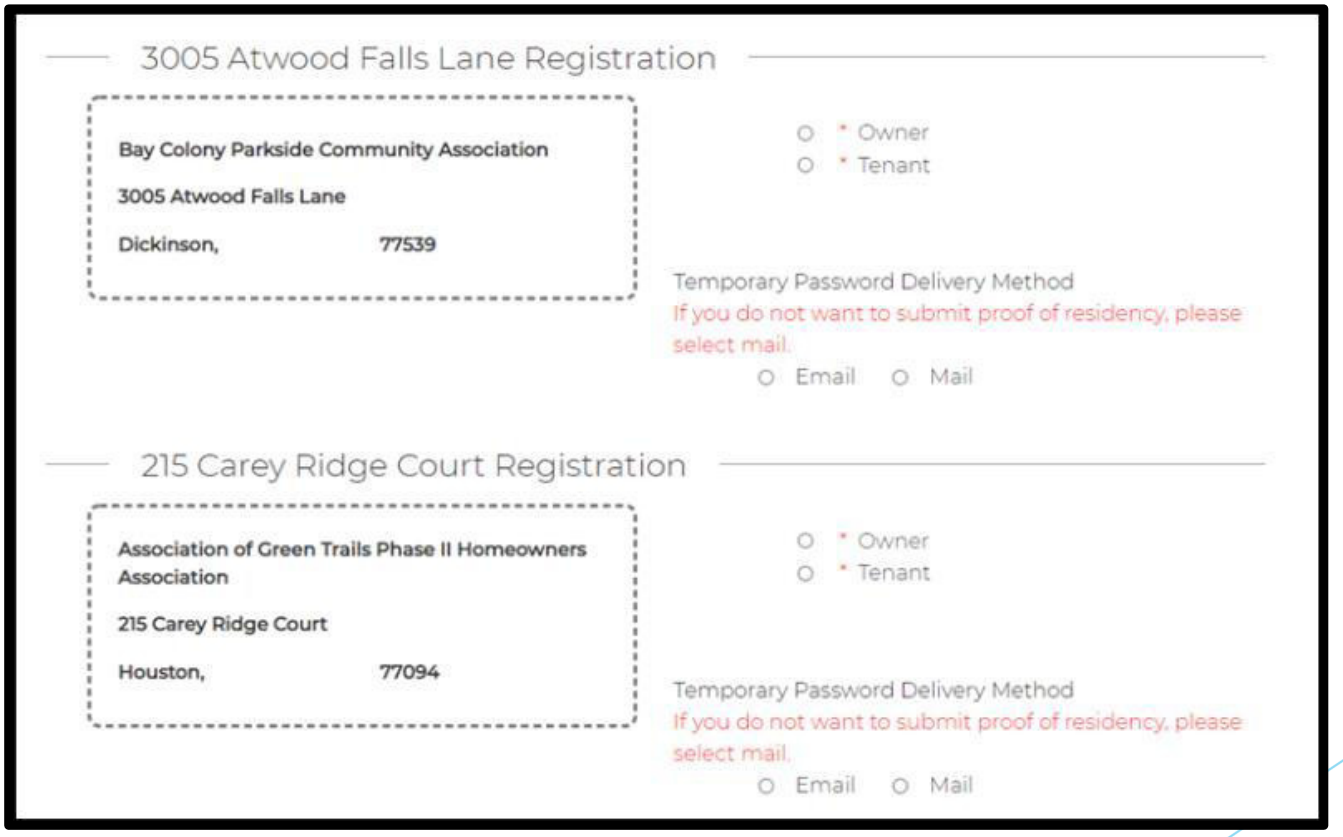


- Click on your address to proceed. If your address is not shown, click Cancel to go back.

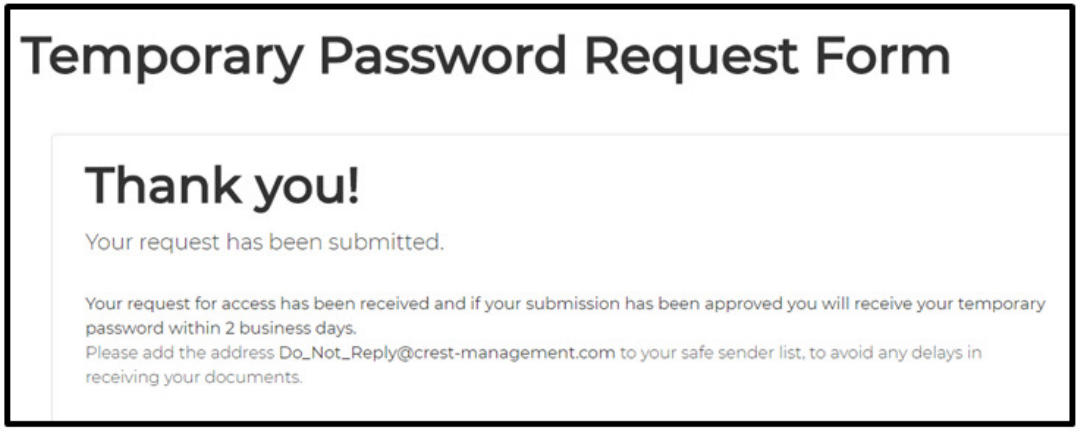


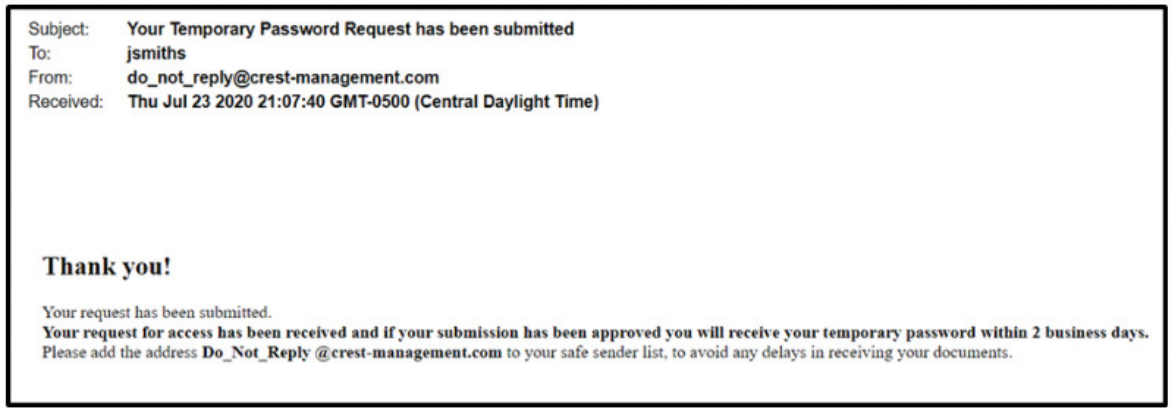
- The address will now appear below. The search bar will remain open, and you can continue to add additional properties you own until complete.

- 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.

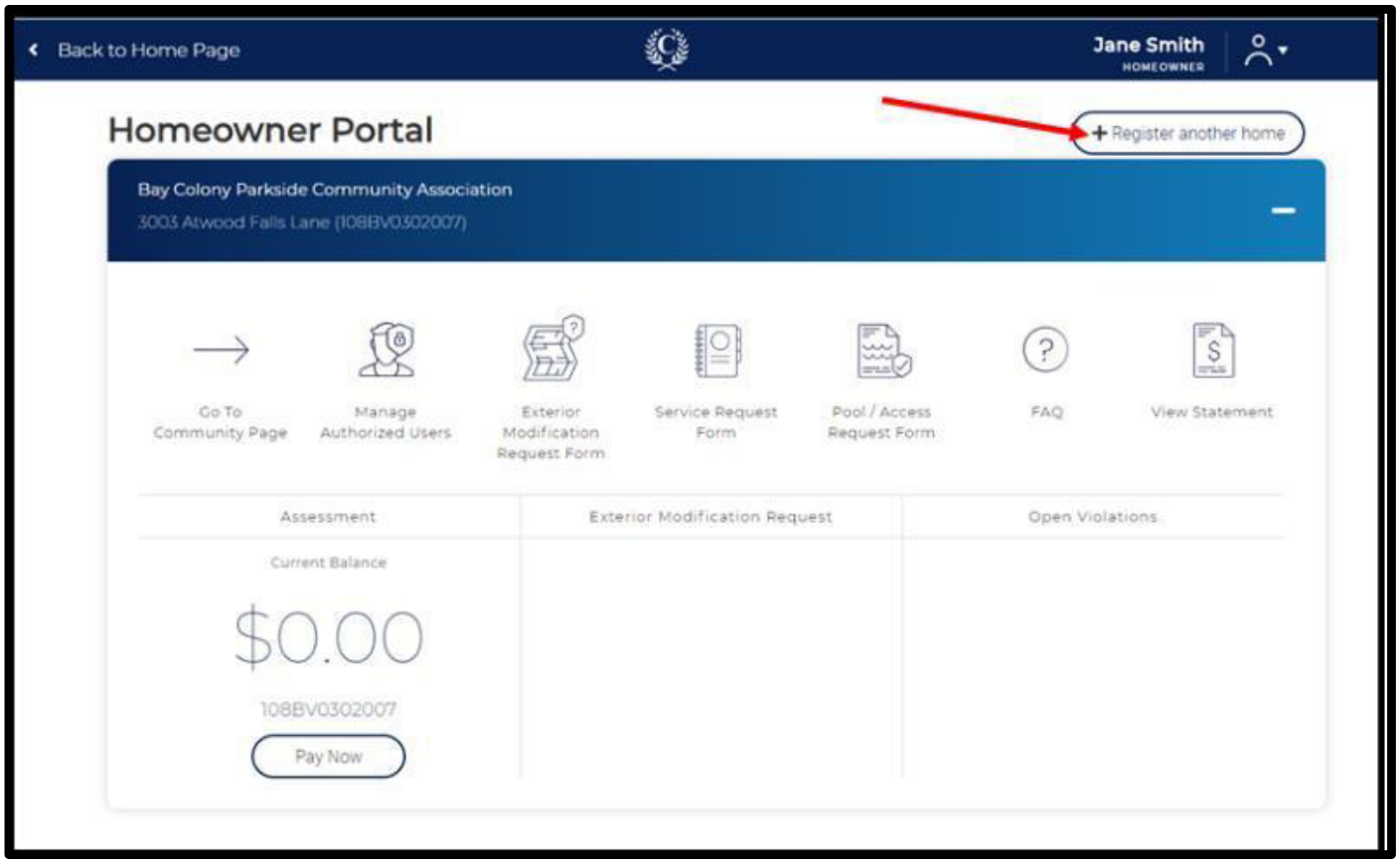
Temporary Password: PasswordTest57

Bay Colony Parkside Community Association - 3005 Atwood Falls Lane

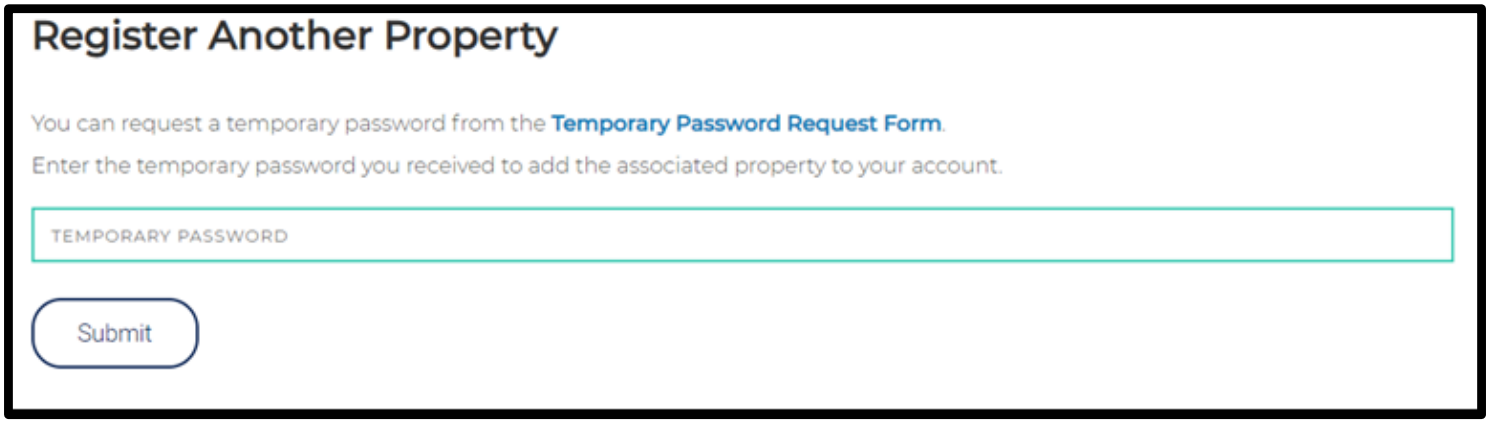
Your Homeowner Portal Access Request has been Denied for the following reason(s): The information submitted does not match our ownership records. Please submit proof of ownership.

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

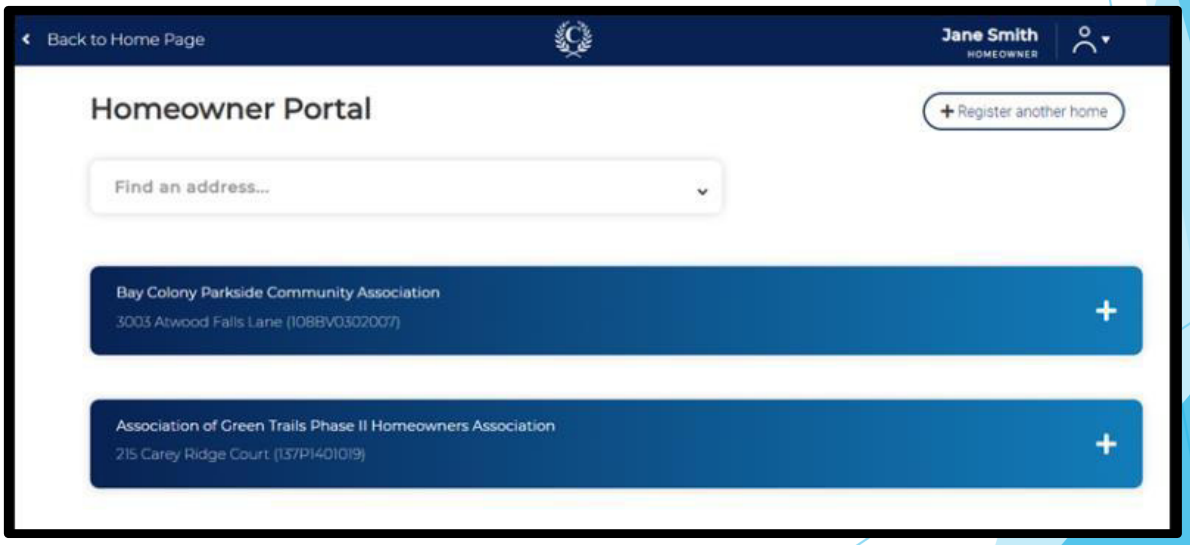
- From your dashboard, click on Register Another Home.



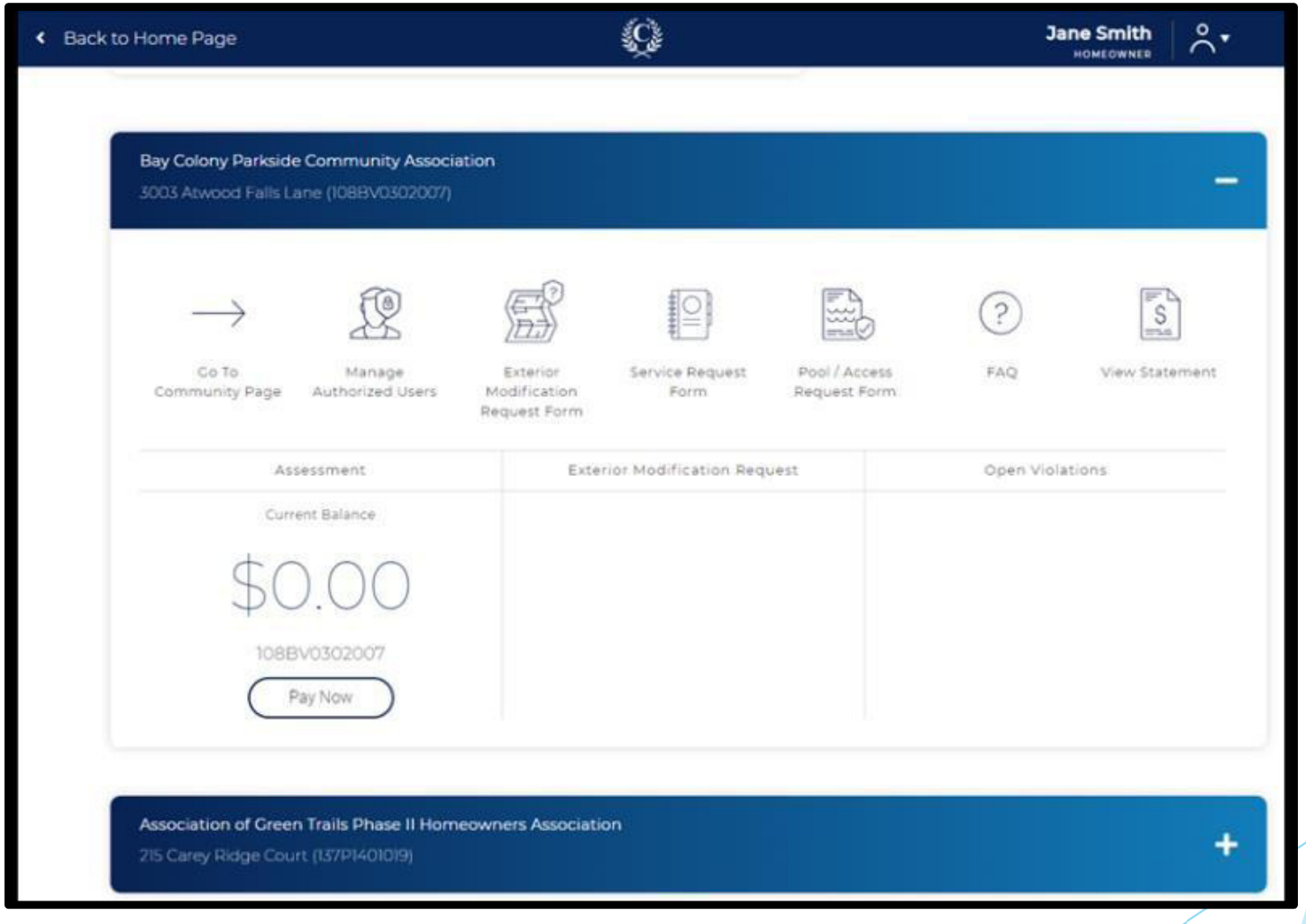
- Enter the temporary password you received by email or mail.
- Click Submit.



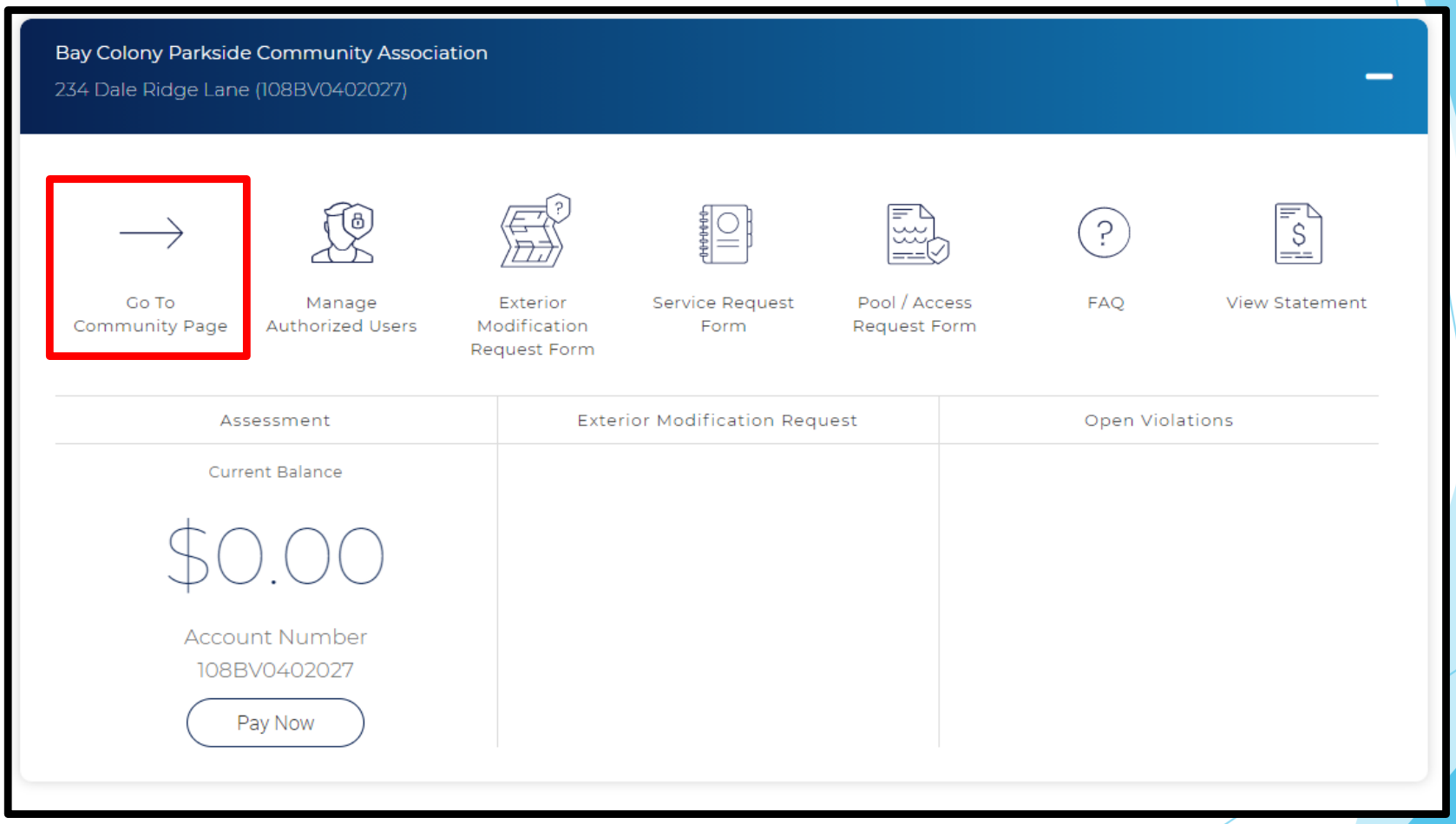
- You will be taken back to your dashboard where you will see each registered home.



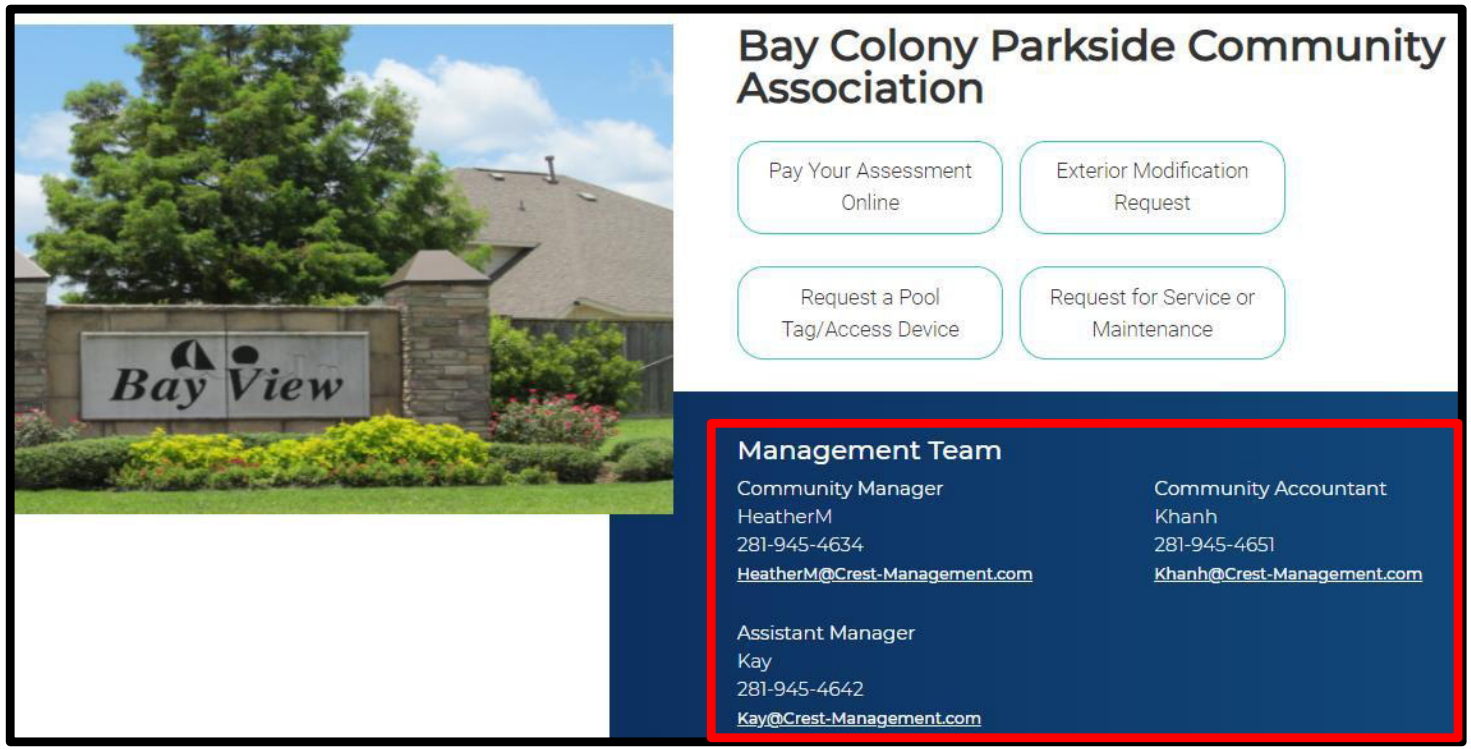
- Click on an address to expand the dashboard for that home.



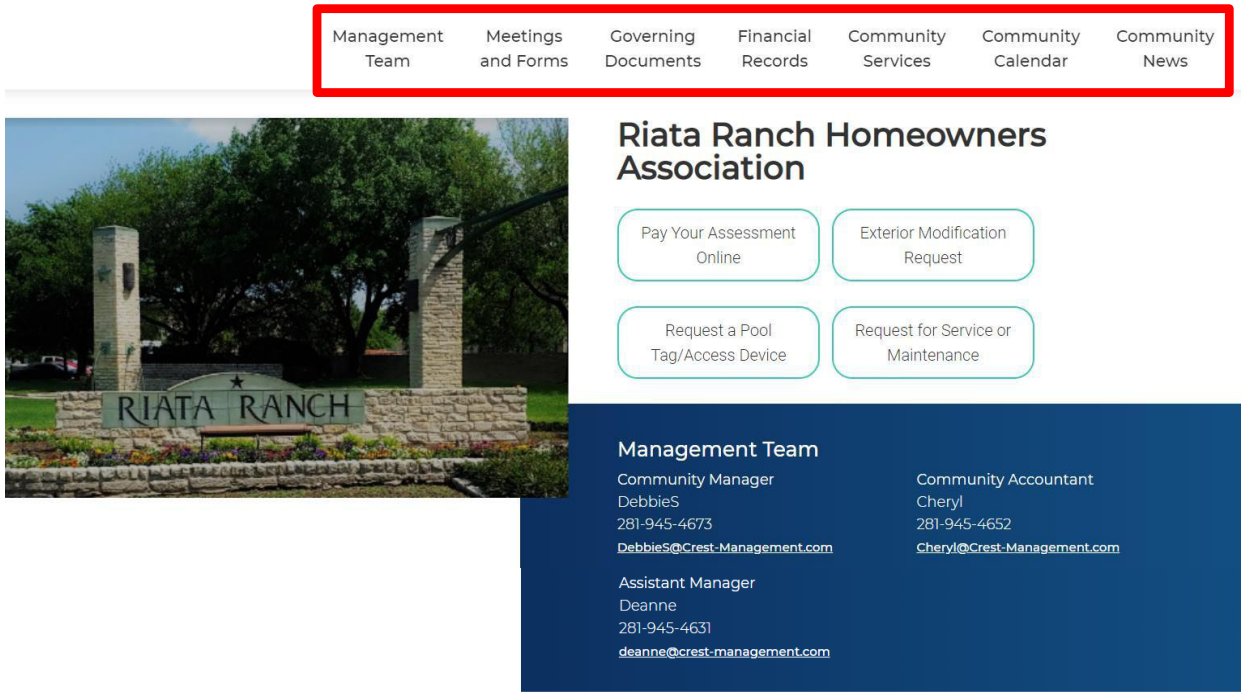
- Go To Community Page gives access to community specific information and document libraries.

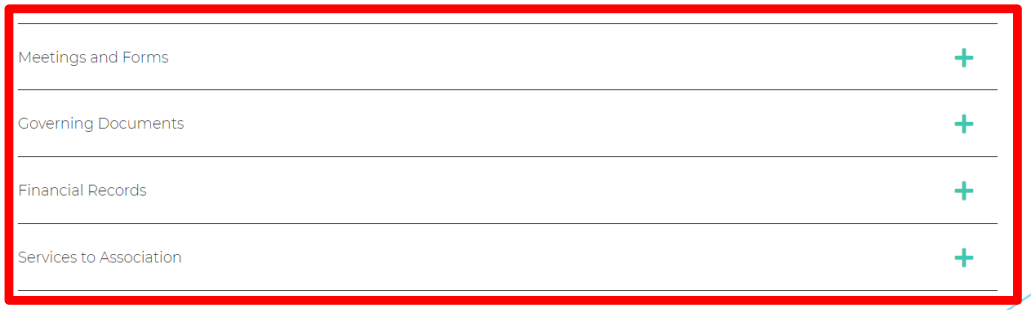


- Find contact information for your Crest Management Team.

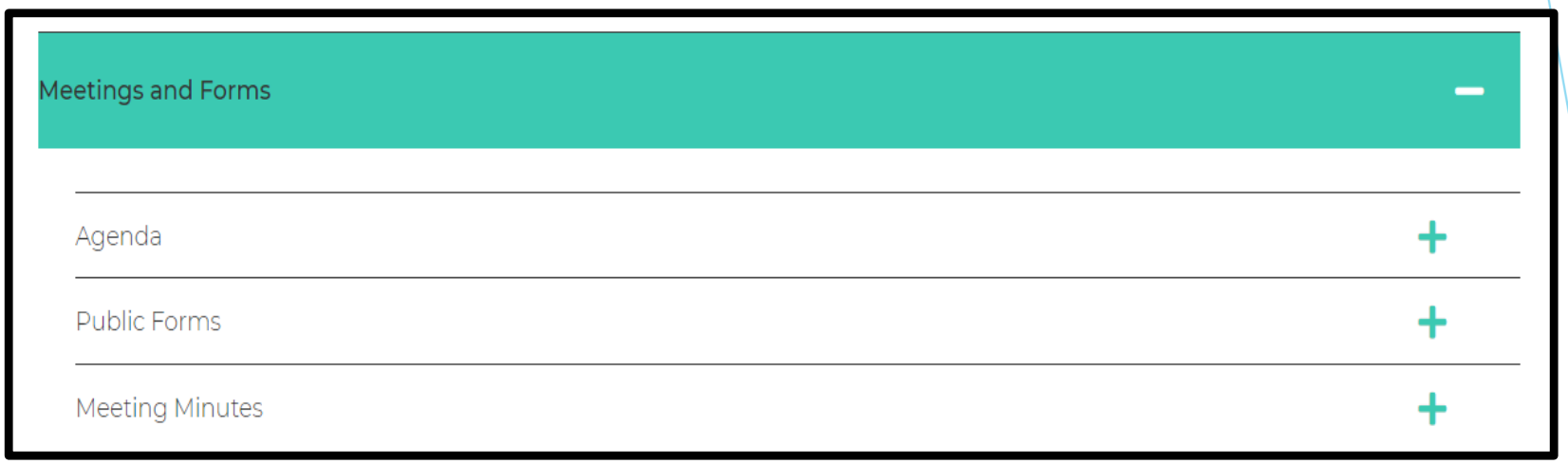


- Use the links at the top or scroll down to access the accordions.
  **Categories may differ based on your community's specifications.*

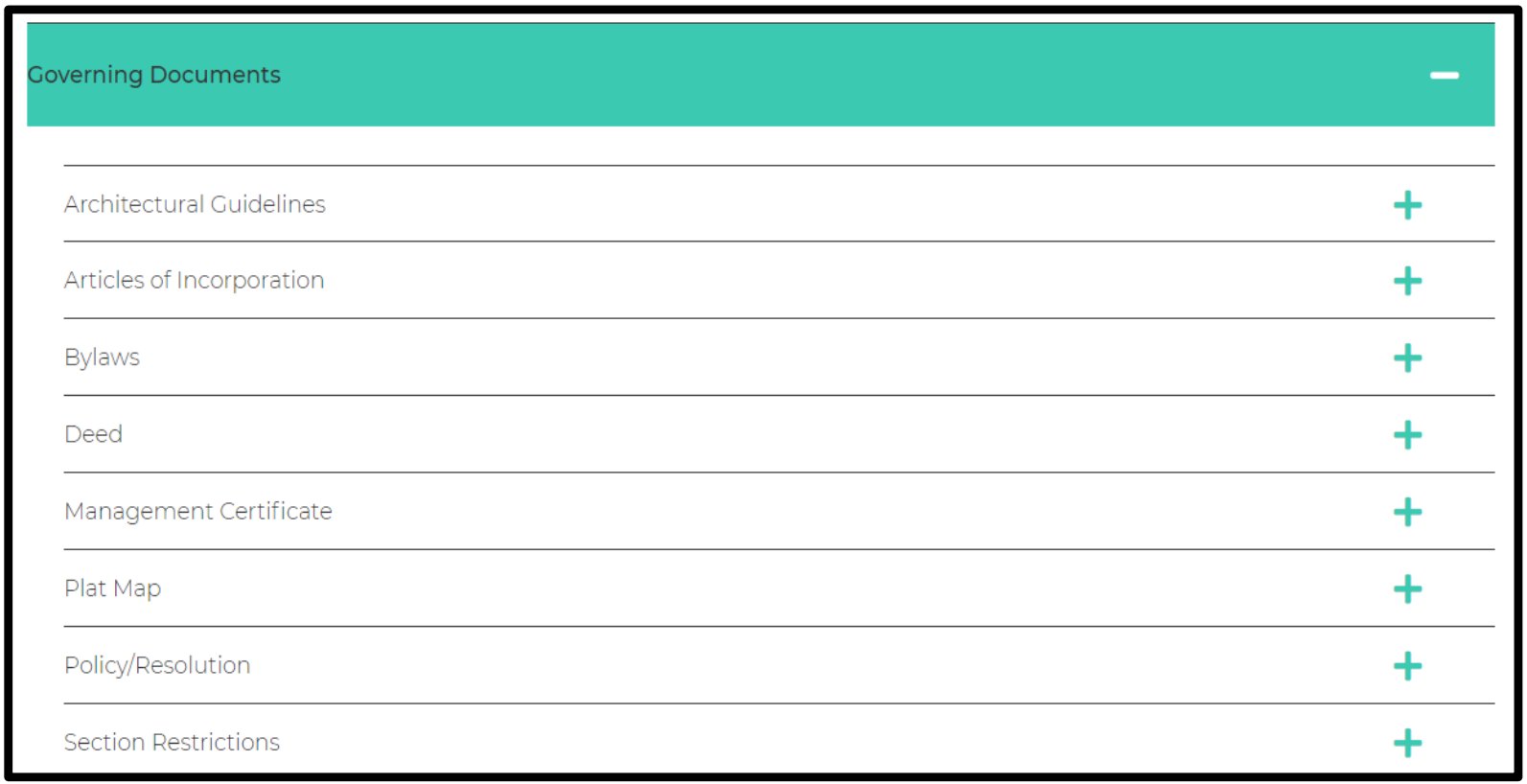




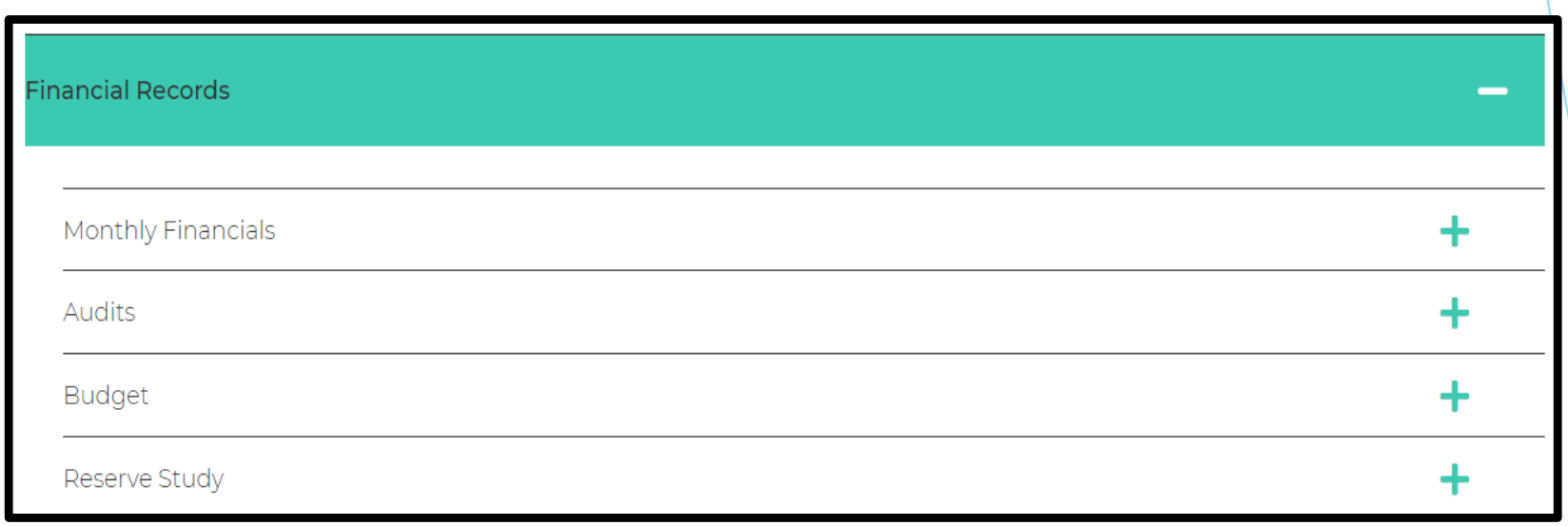
- Meetings and Forms gives access to upcoming Meeting Agendas and Public Forms. Some communities have access to current and historical Meeting Minutes. Click the category name or + to expand the list.



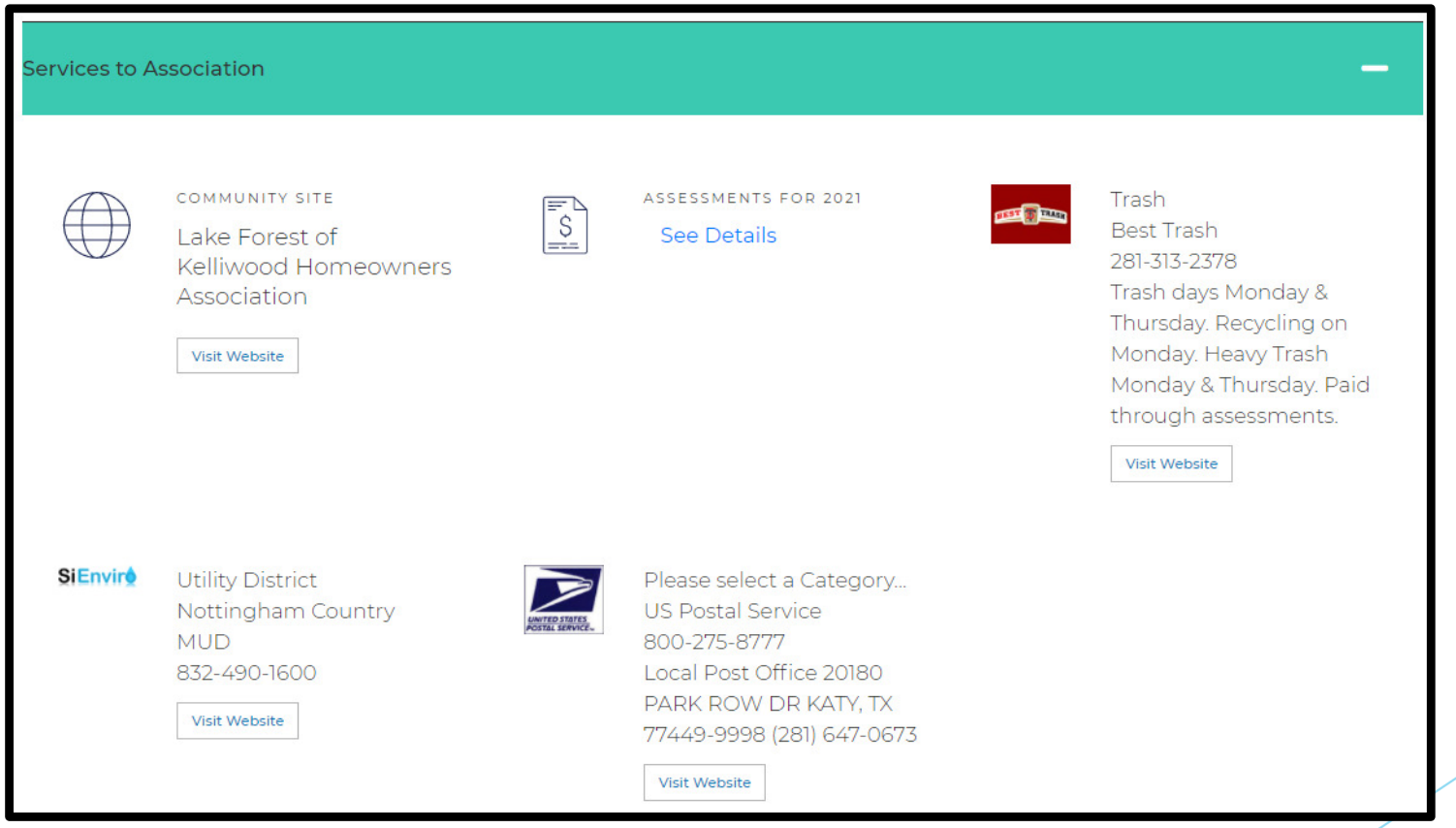
- Governing Documents includes all rules and regulations governing the association.



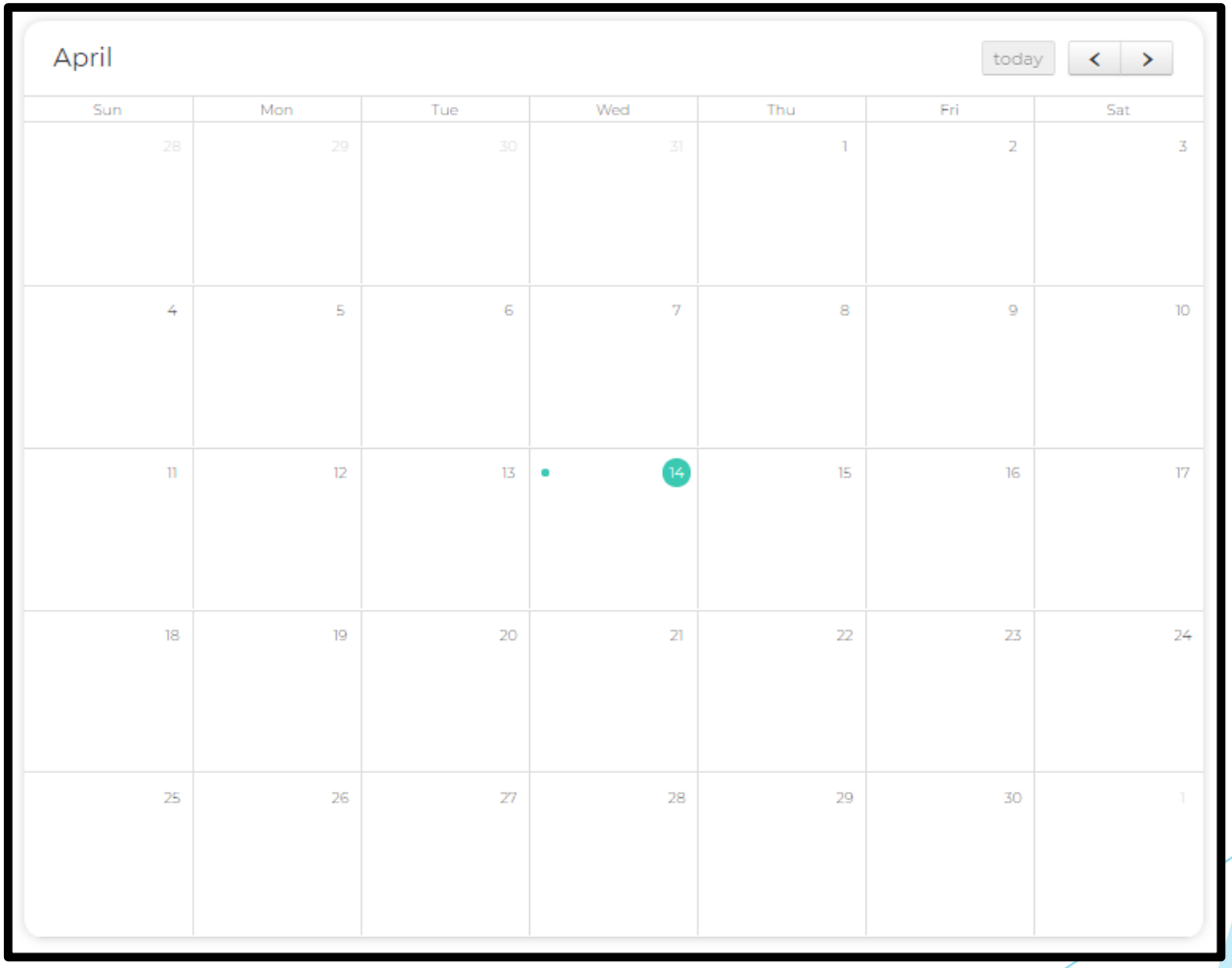
- Financial Records are not provided to all communities. Where available, it includes Monthly Financials (including historical data), most recent Audit, current year Budget, and most recent Reserve Study.



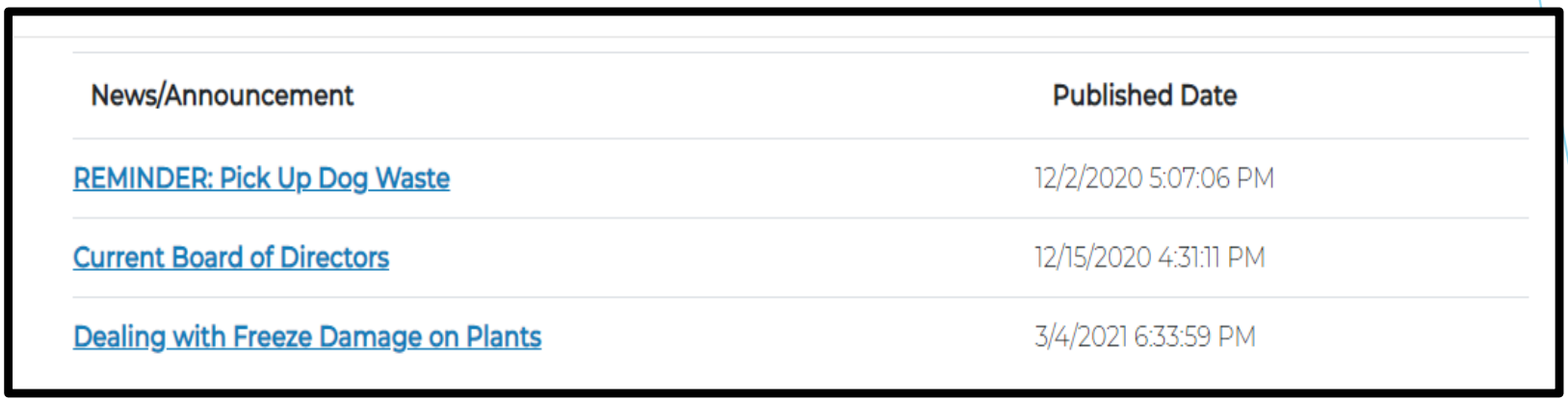
- Community Services to Association contains assessment information along with contact information for utility companies, community contractors, and city and county offices.



- The Community Calendar, when included, shows Meetings and Community Events indicated in green. Click the dot for more information.

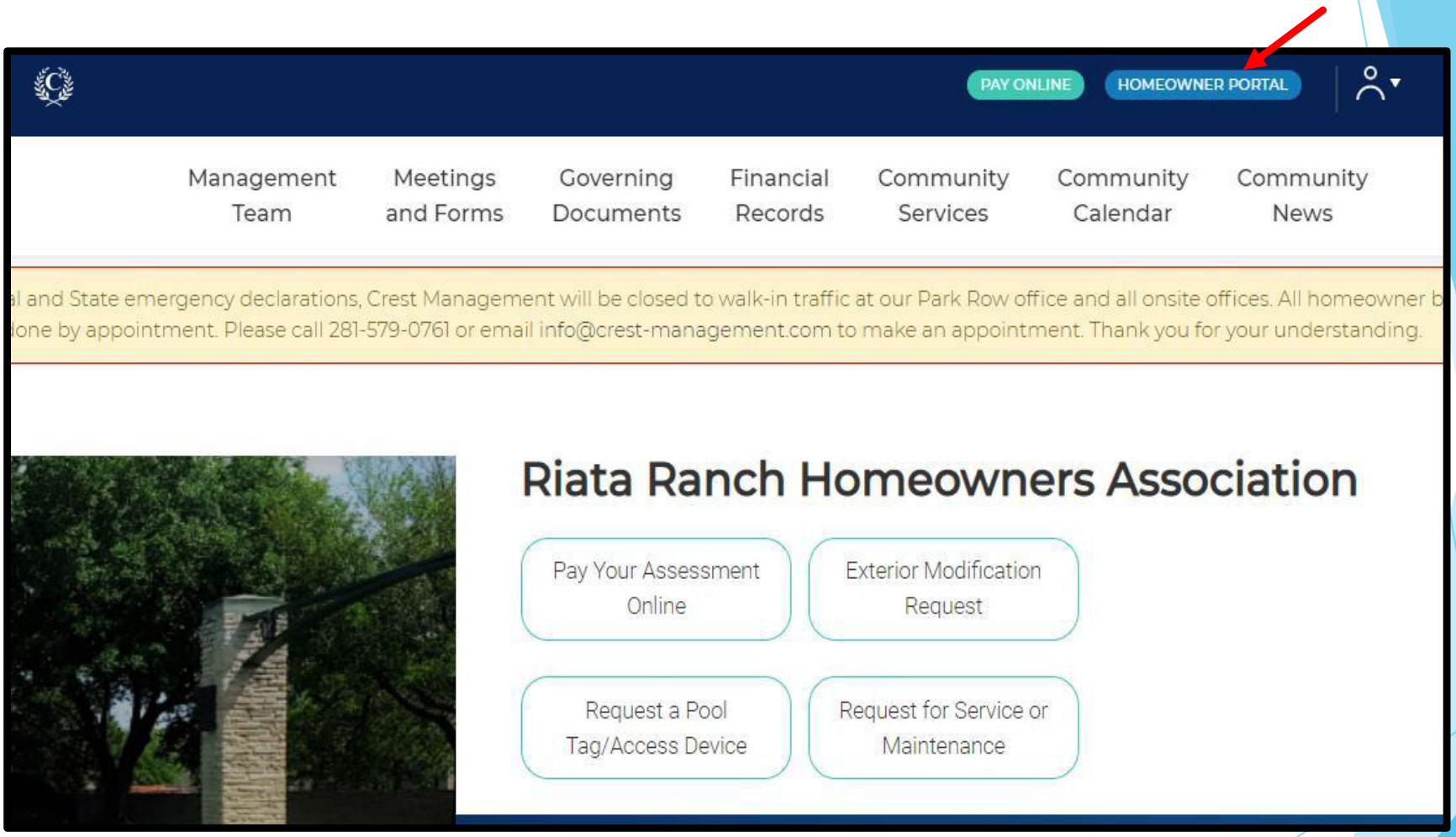


- News and Announcements brings articles, reminders, and information directly to you from your Board of Directors. This section may not appear on all community pages.

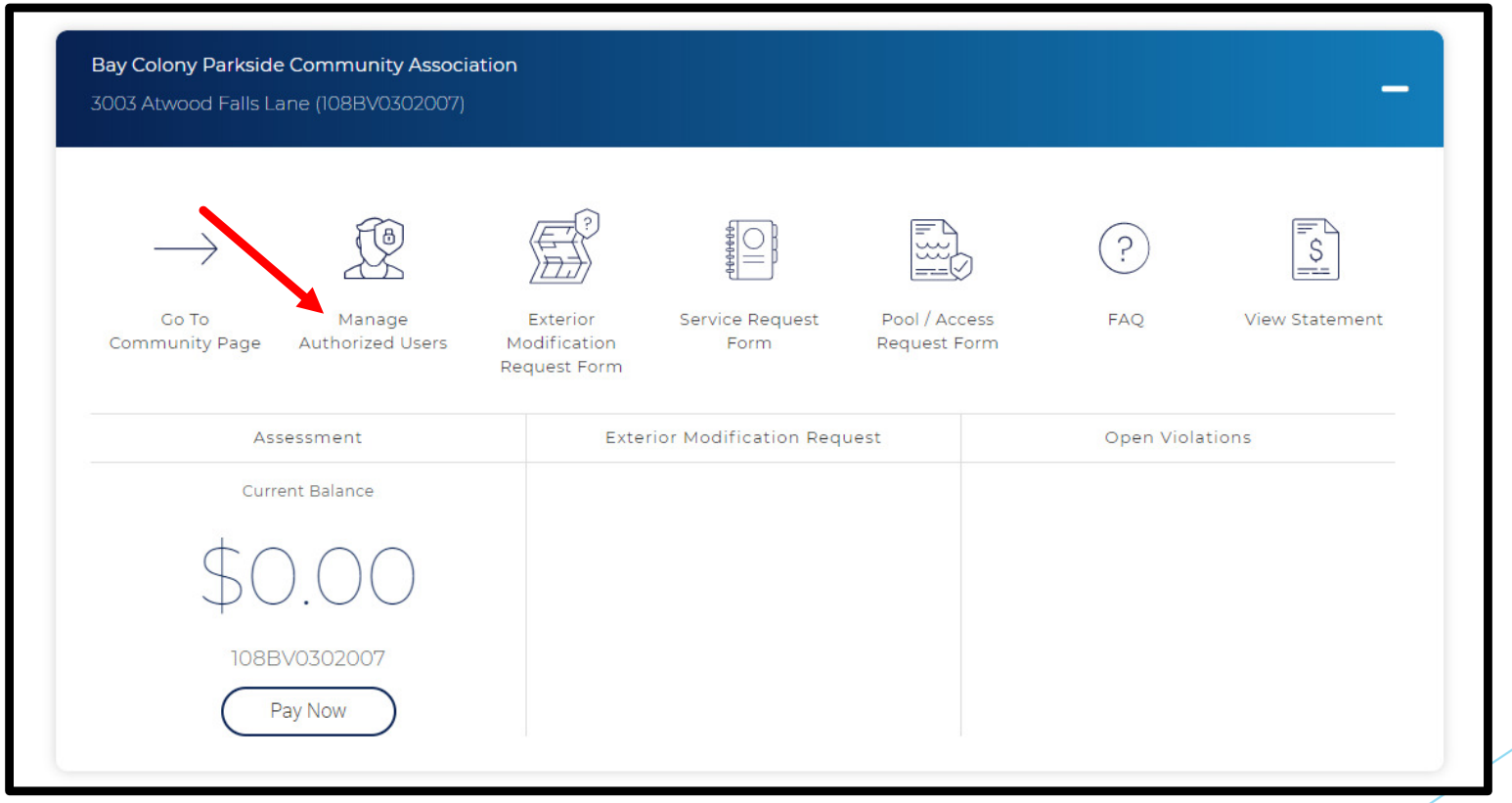


News/Announcement	Published Date
REMINDER: Pick Up Dog Waste	12/2/2020 5:07:06 PM
Current Board of Directors	12/15/2020 4:31:11 PM
Dealing with Freeze Damage on Plants	3/4/2021 6:33:59 PM

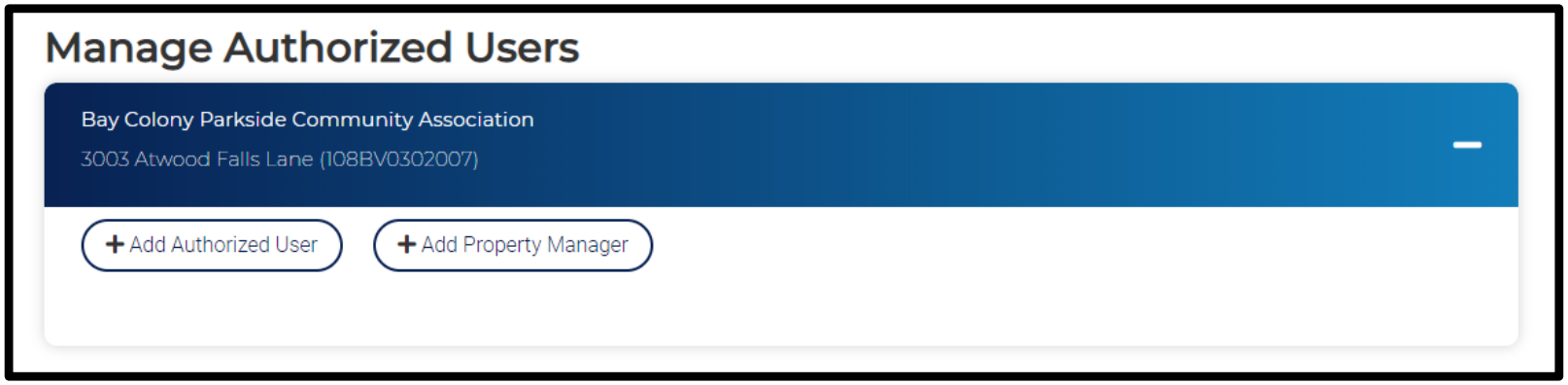
- Click Homeowner Portal to return to the Homeowner Dashboard.



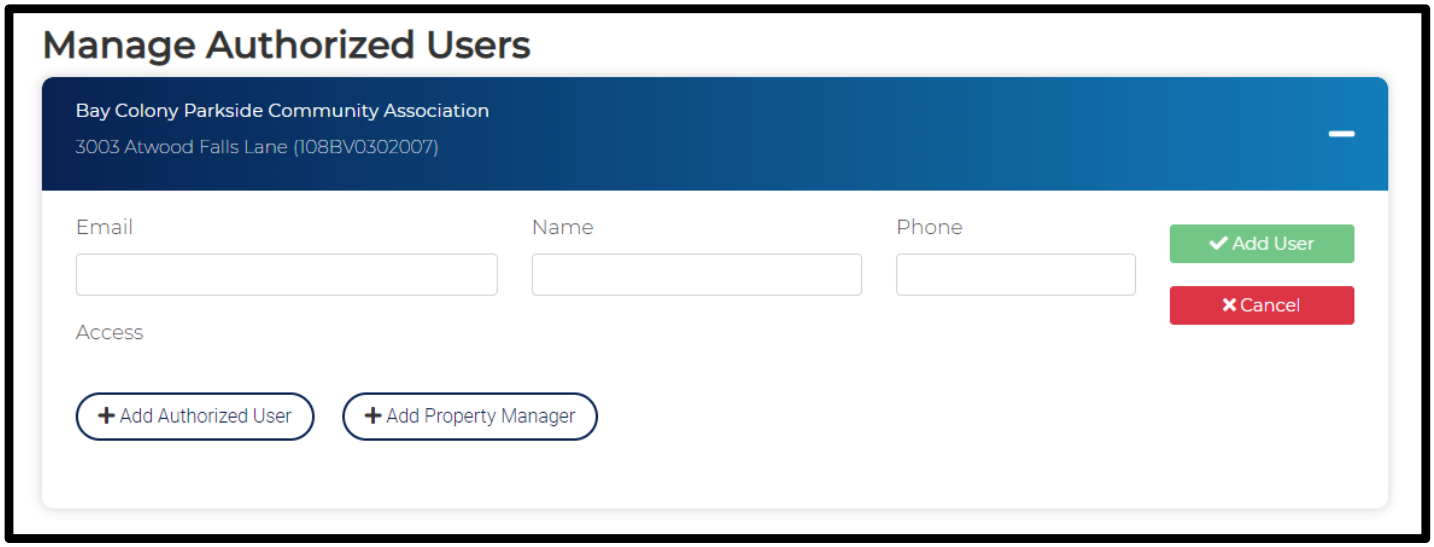
- From your dashboard, click on Manage Authorized Users.
  - If you own multiple homes, click on the home you want to work with to expand the dashboard.



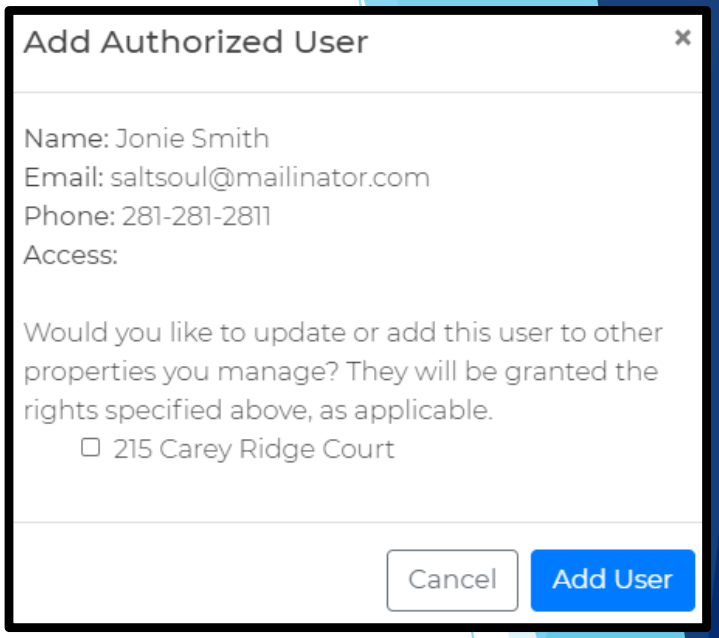
- Select Add Authorized User to add a family member, contractor, or tenant. You can customize what type of access each authorized user is given.



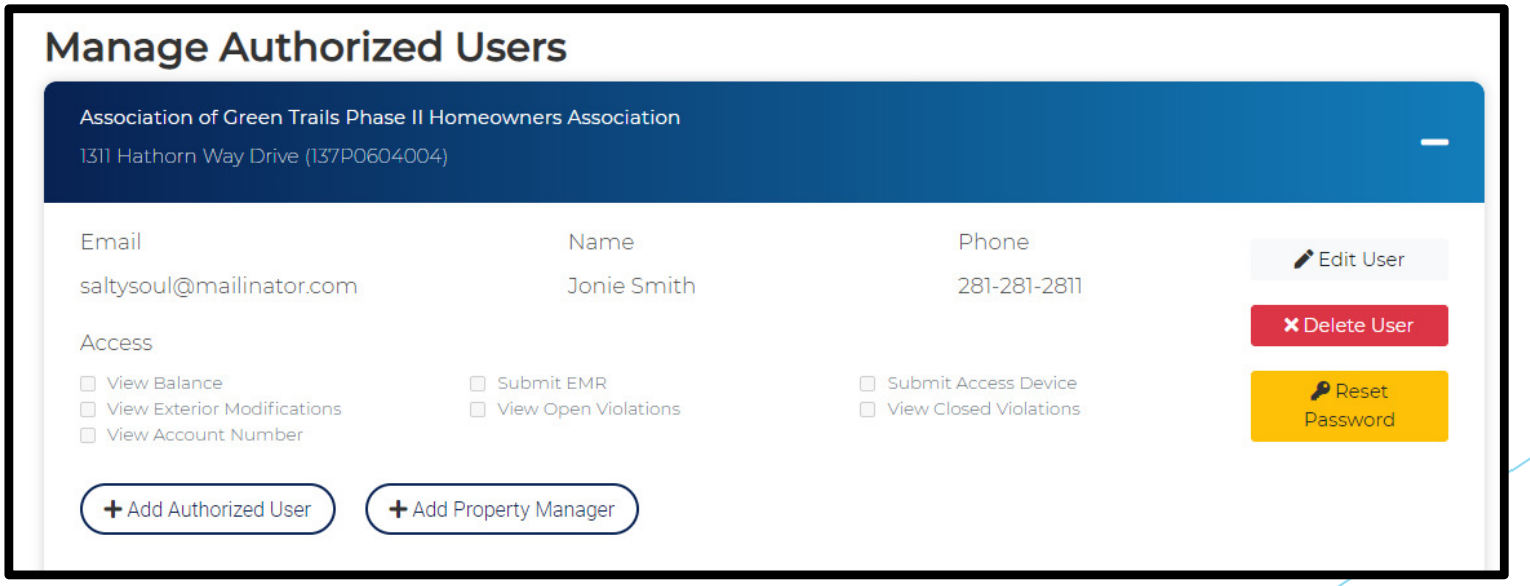
- Enter the Email, Name and Phone Number of the authorized user.
- Click Add User.



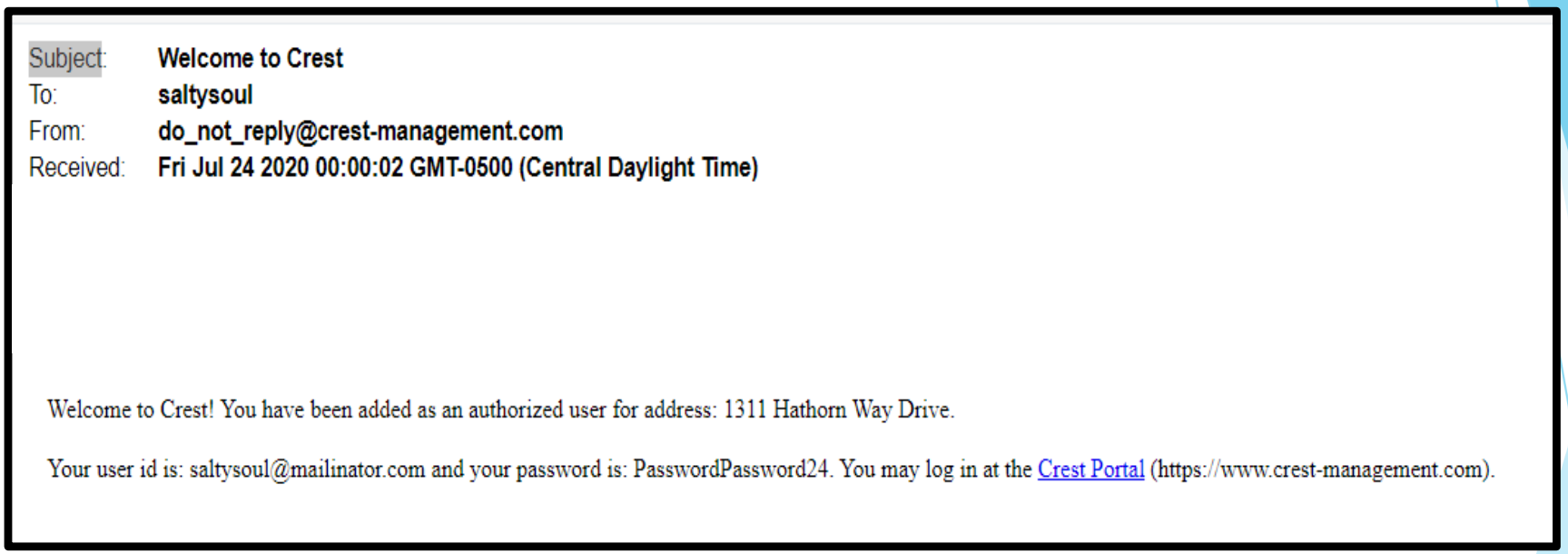
- If you have more than one home registered, you will be asked if you want to grant the authorized user access to other homes as well.



- 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.

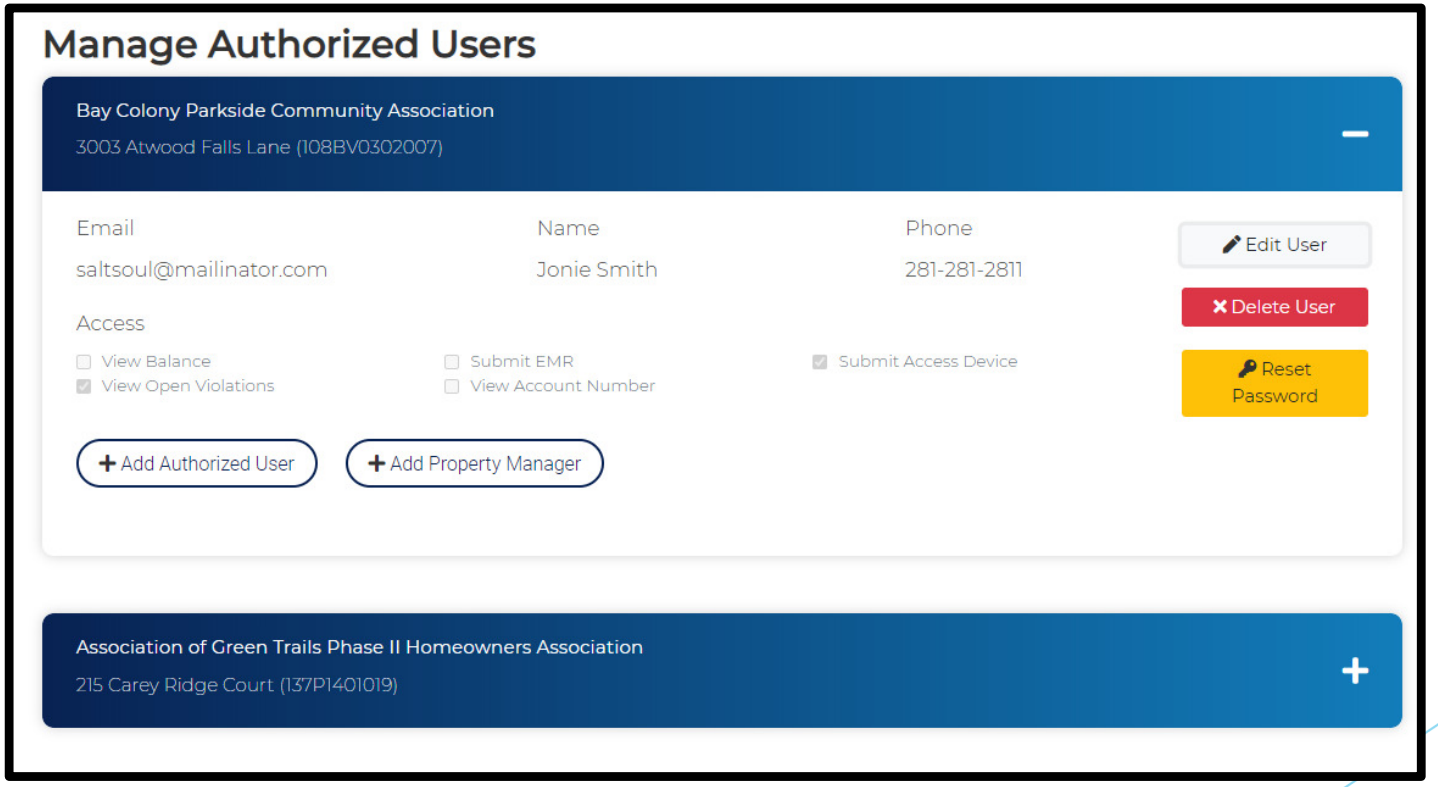


Subject: **Welcome to Crest**
To: **saltysoul**
From: **do_not_reply@crest-management.com**
Received: **Fri Jul 24 2020 00:00:02 GMT-0500 (Central Daylight Time)**

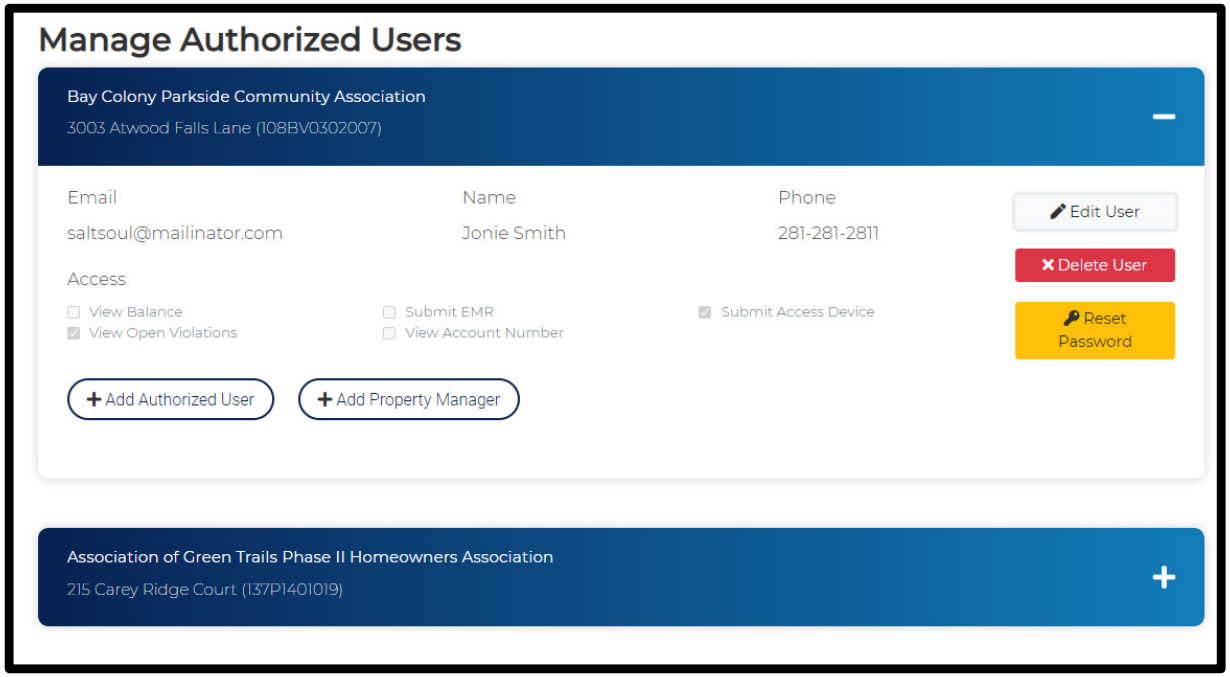
Welcome to Crest! You have been added as an authorized user for address: 1311 Hathorn Way Drive.

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).

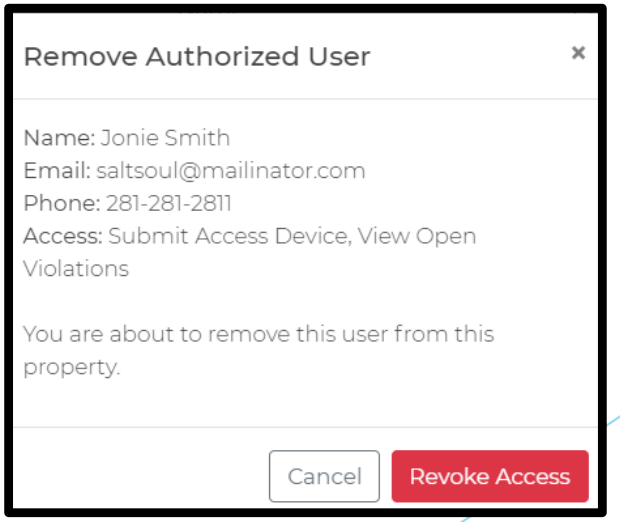
- Edit an authorized user by clicking Edit User. You can update the name, phone number, and what they are permitted to access.
  - The email address cannot be updated. If the authorized user's email has change, you must delete the user and add them as a new authorized user.
- Click Save User.



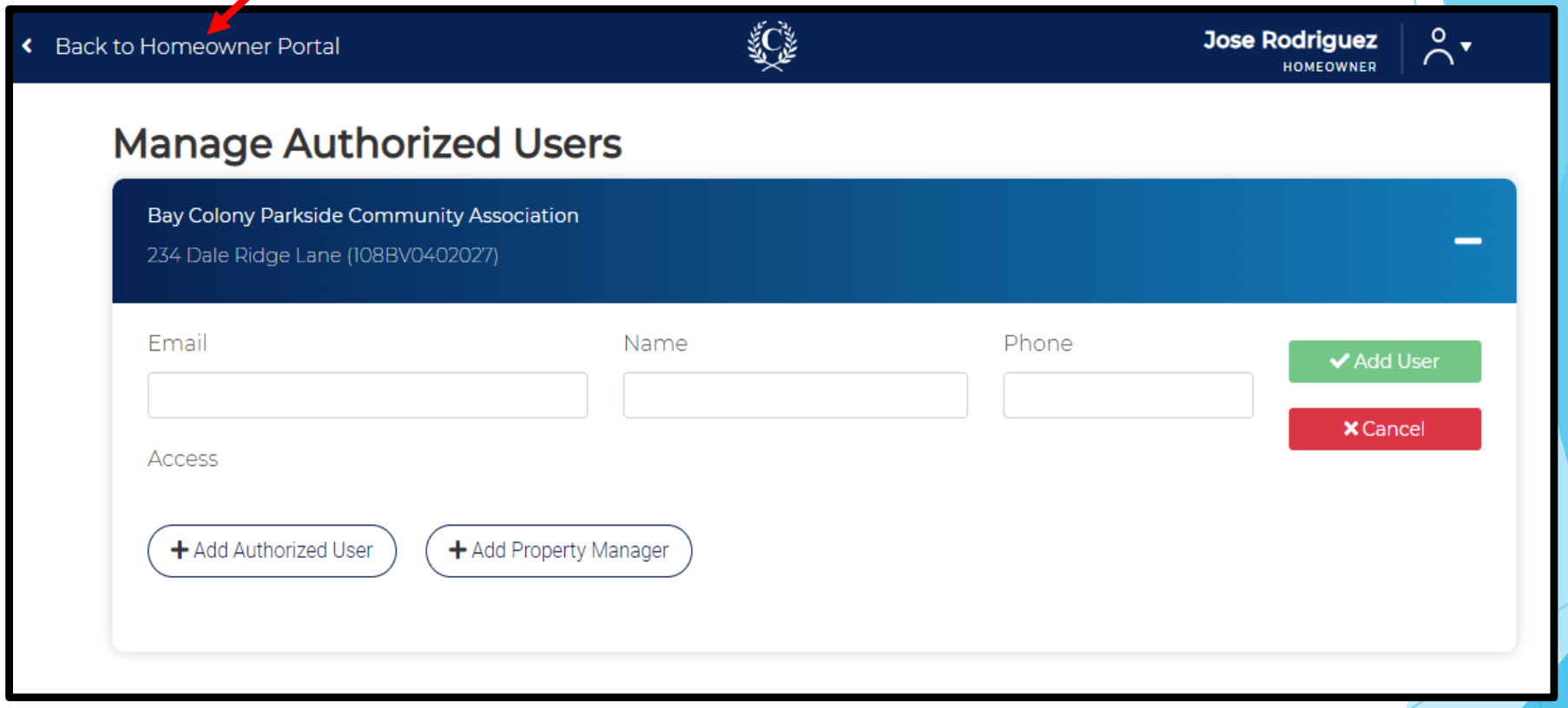
- To delete an authorized user, click Delete User.



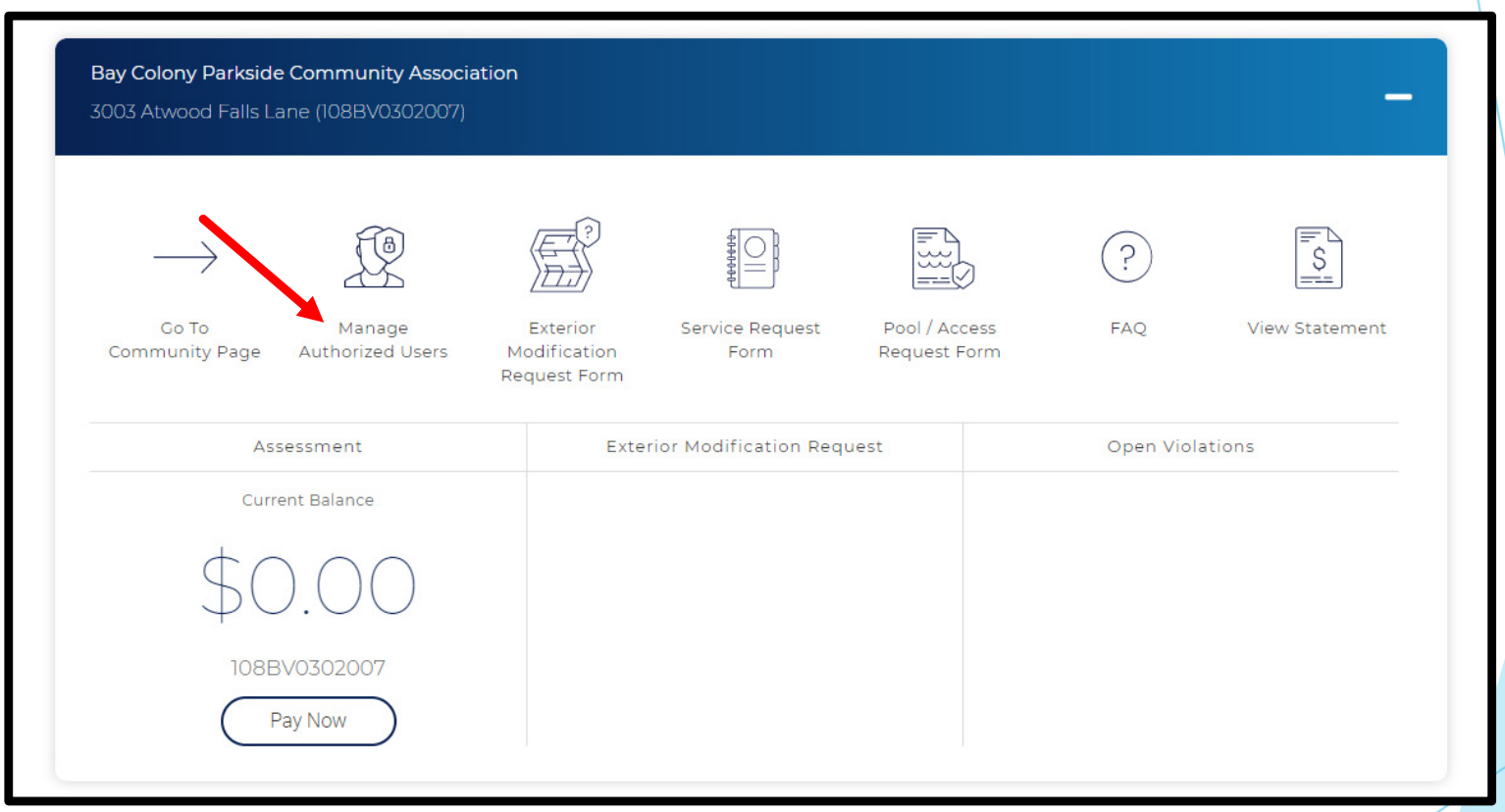
- Click Revoke Access.



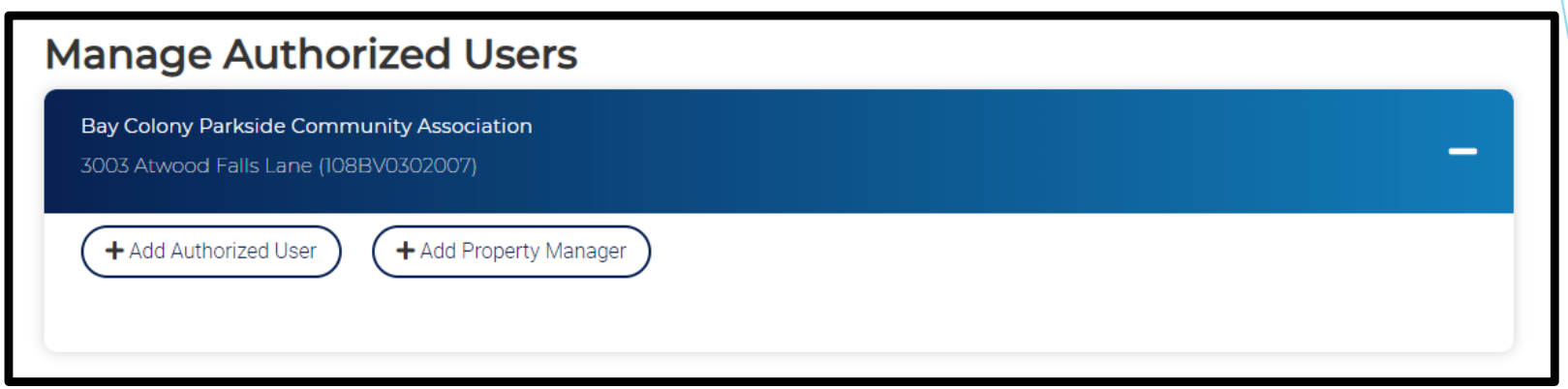
- Click Back to Homeowner Portal to return to the Homeowner Dashboard.



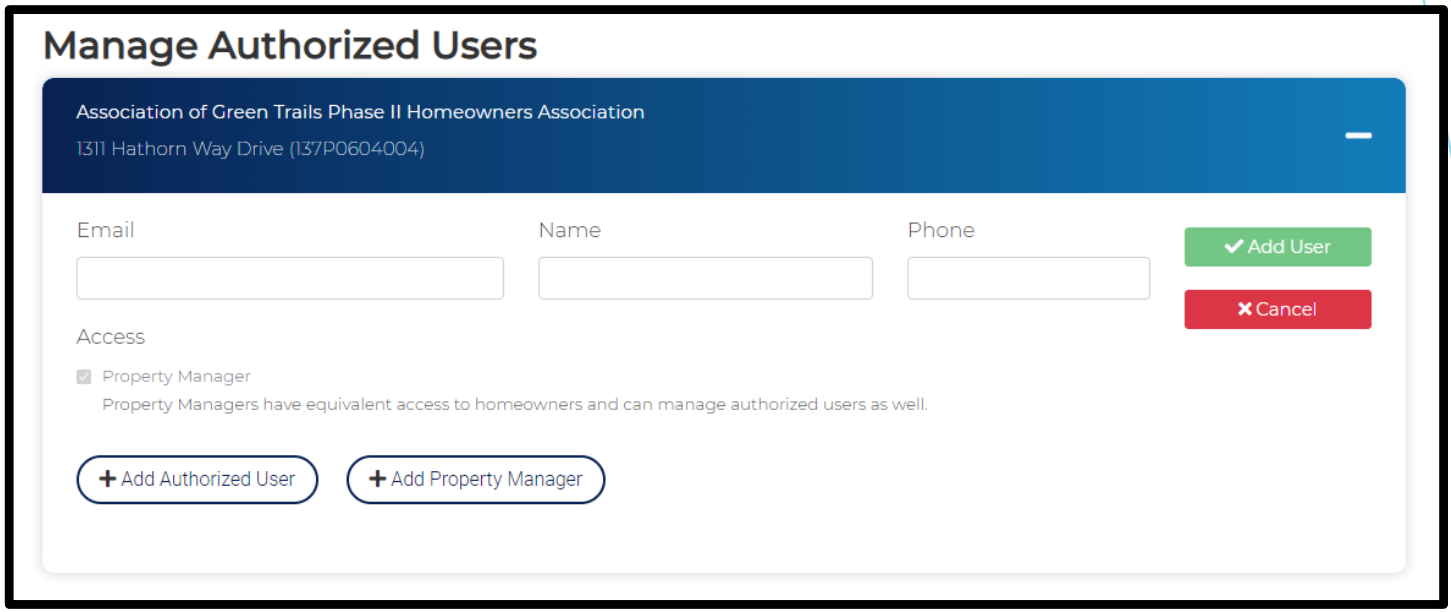
- From your dashboard, click on Manage Authorized Users.
  - If you own multiple homes, click on the home you want to work with to expand the dashboard.



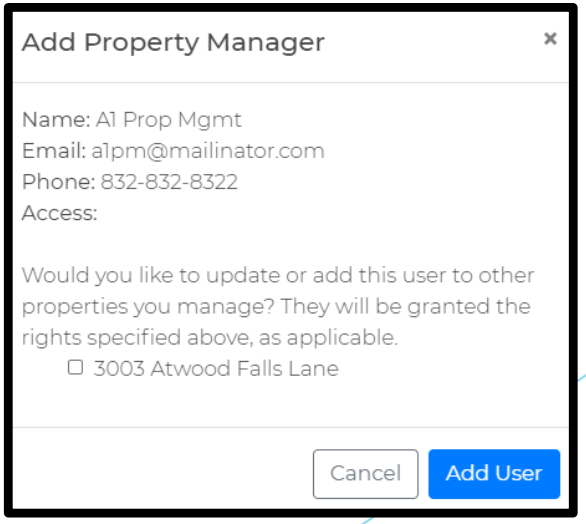
- Select Add Property Manager if you have hired a property manager to act on your behalf. Property managers are granted full access to the account and can also manage authorized users.



- 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.



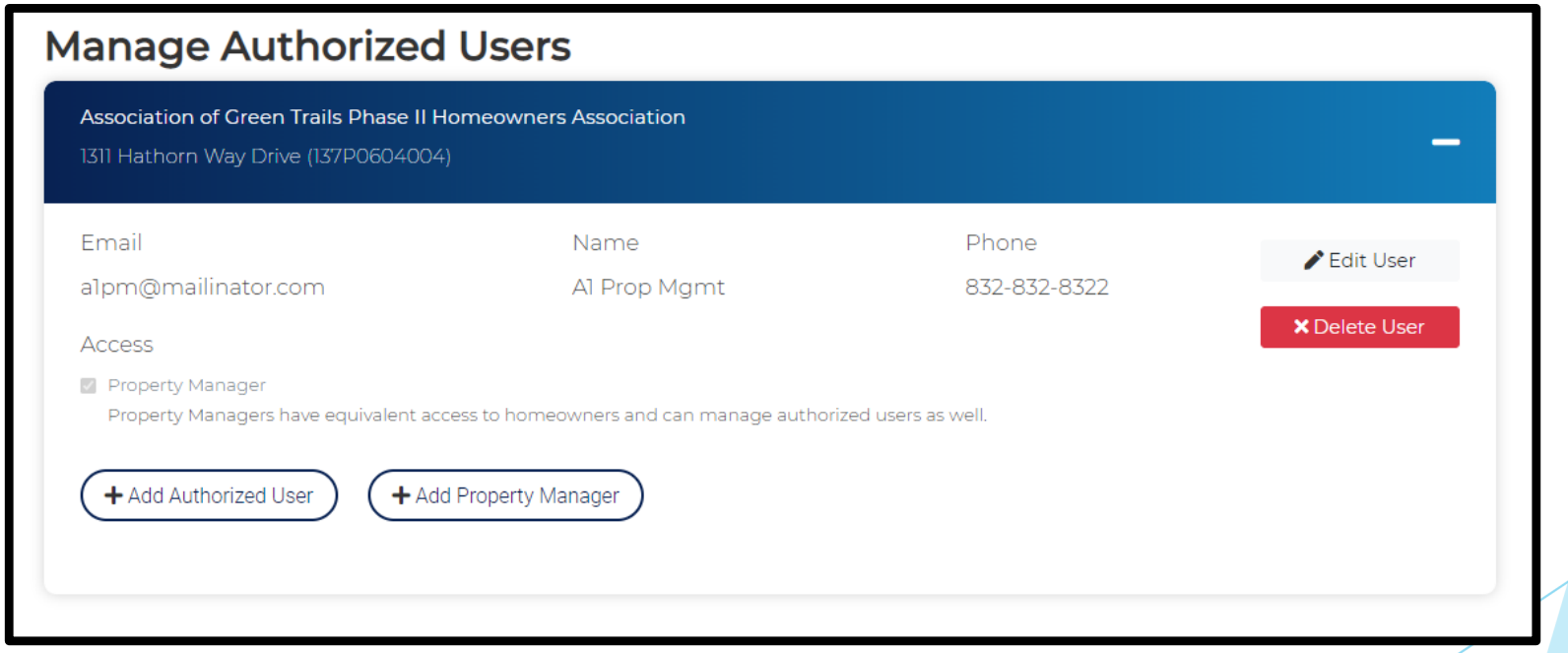
- The property manager will receive an email containing their log in information.

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)**

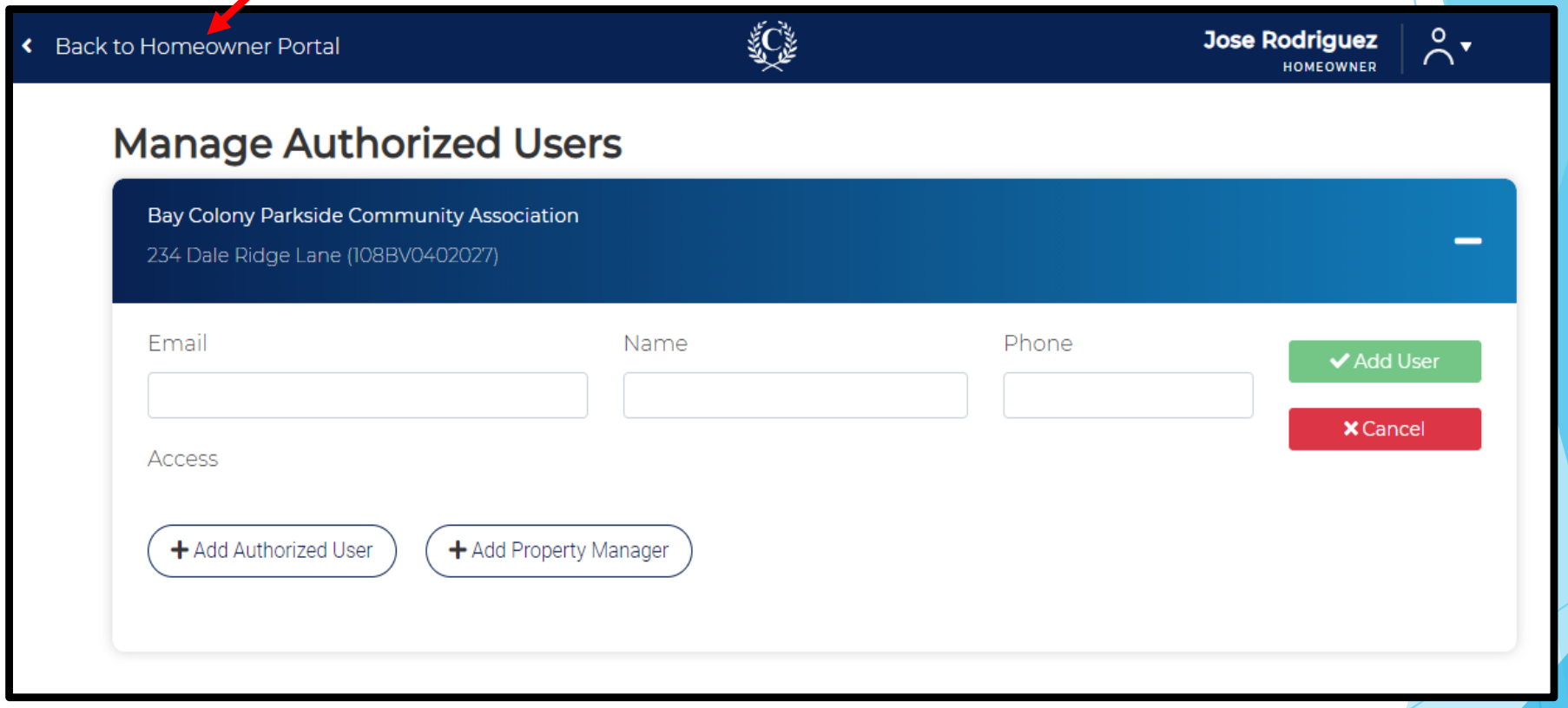
Welcome to Crest! You have been added as a property manager for address: 1311 Hathorn Way Drive.

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).

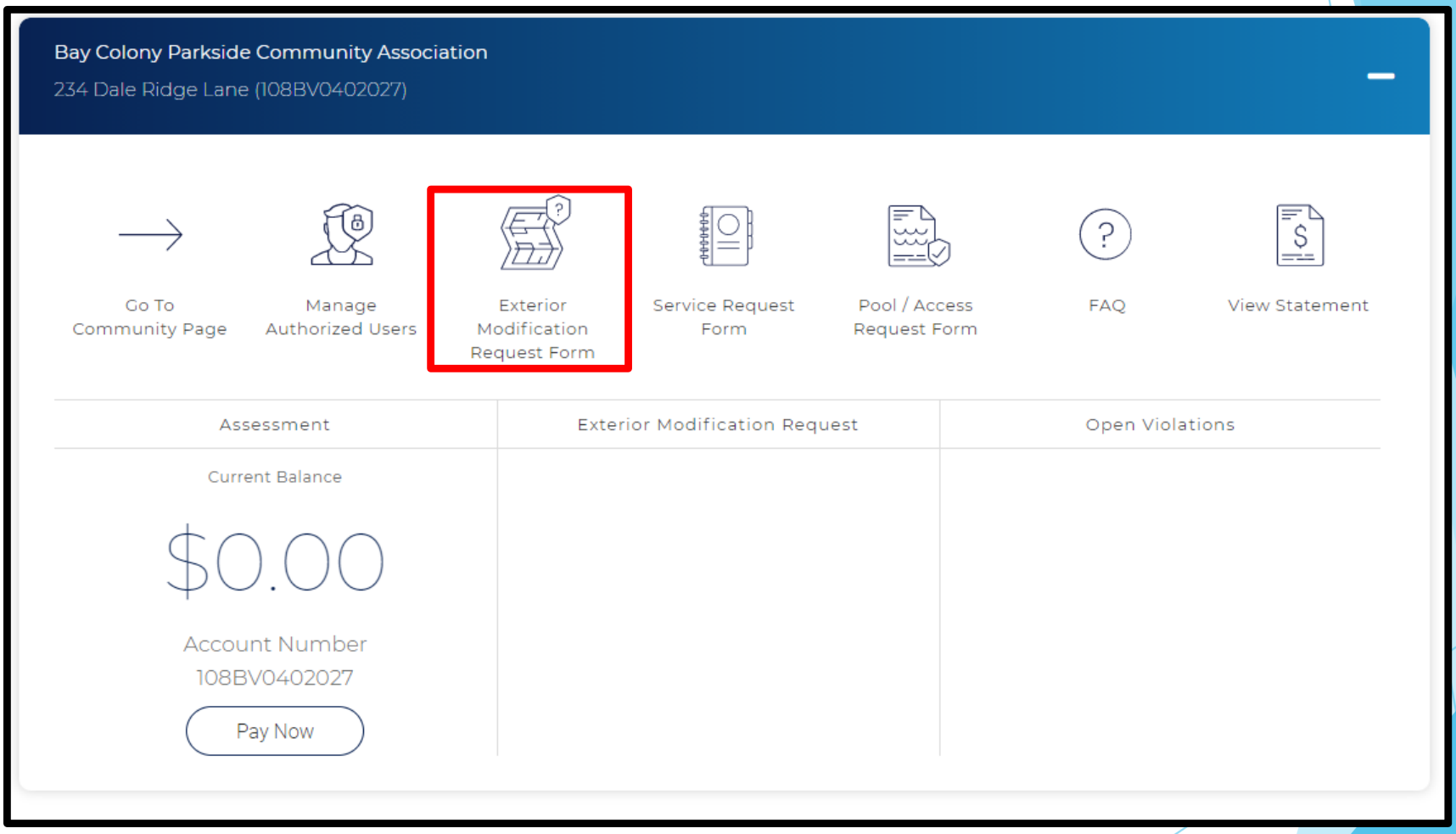
- Click Edit User to edit a property manager's name or phone number.
  - The email address cannot be updated. If the property manager's email has change, you must delete them and add them as a new property manager.
- Click Save User.



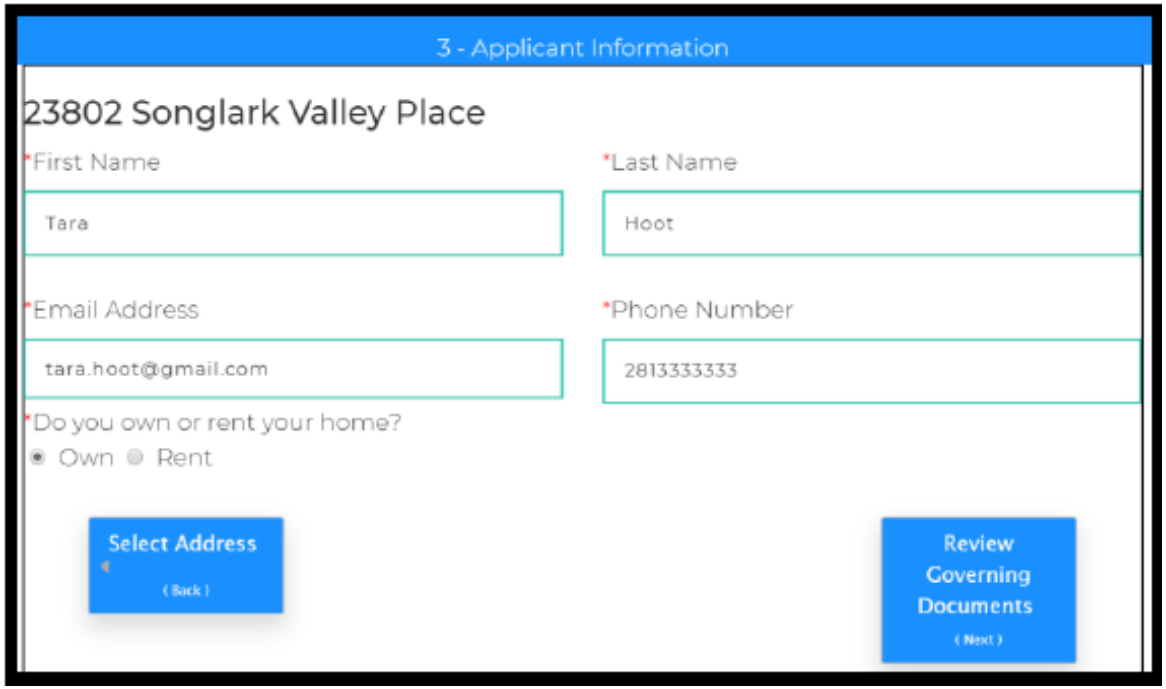
- Click Back to Homeowner Portal to return to the Homeowner Dashboard.



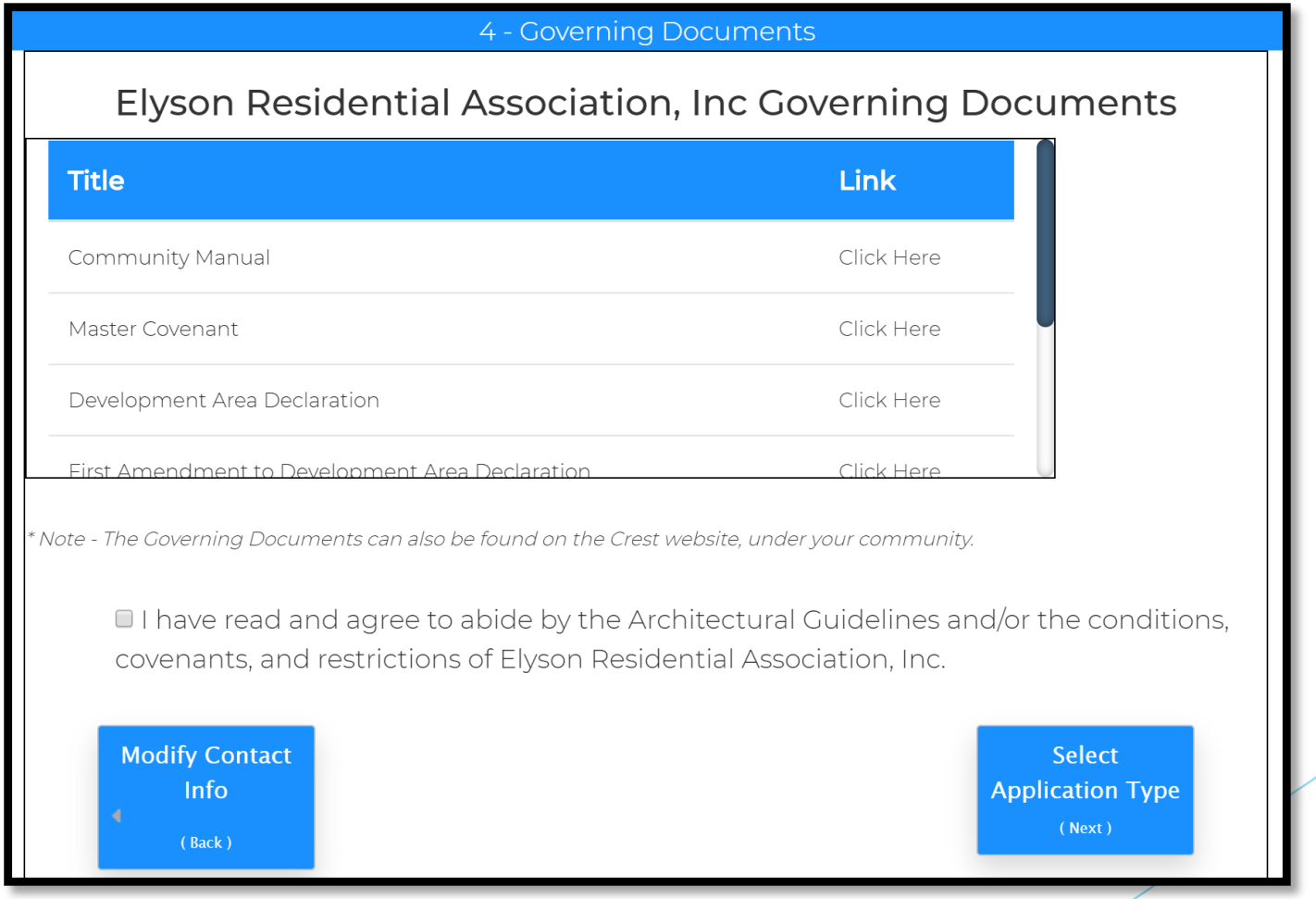
- Exterior Modification Request Form is the application for approval of architectural changes to your home.



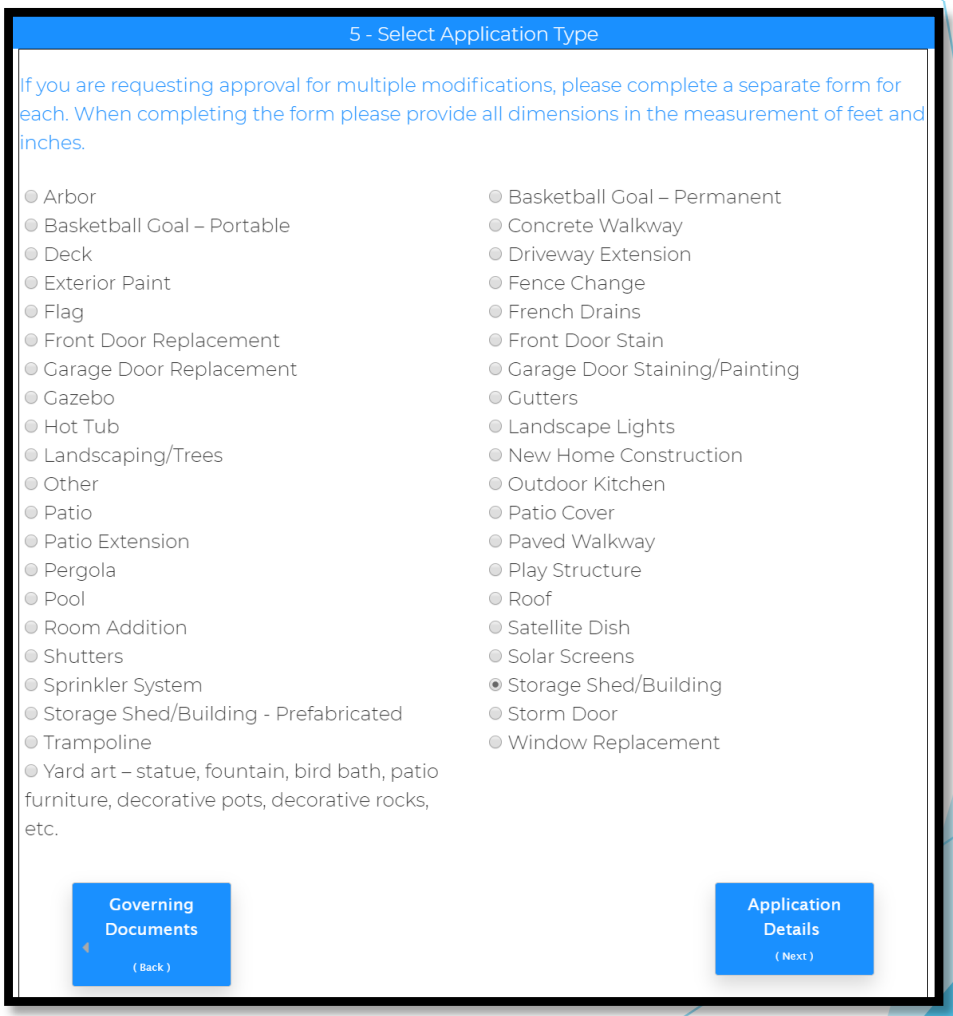
- Your contact information will be prefilled. Confirm it is correct and click Review Governing Documents (Next). **If you rent, change the selection and additional fields will populate. Complete those fields before clicking Review Governing Documents (Next).*



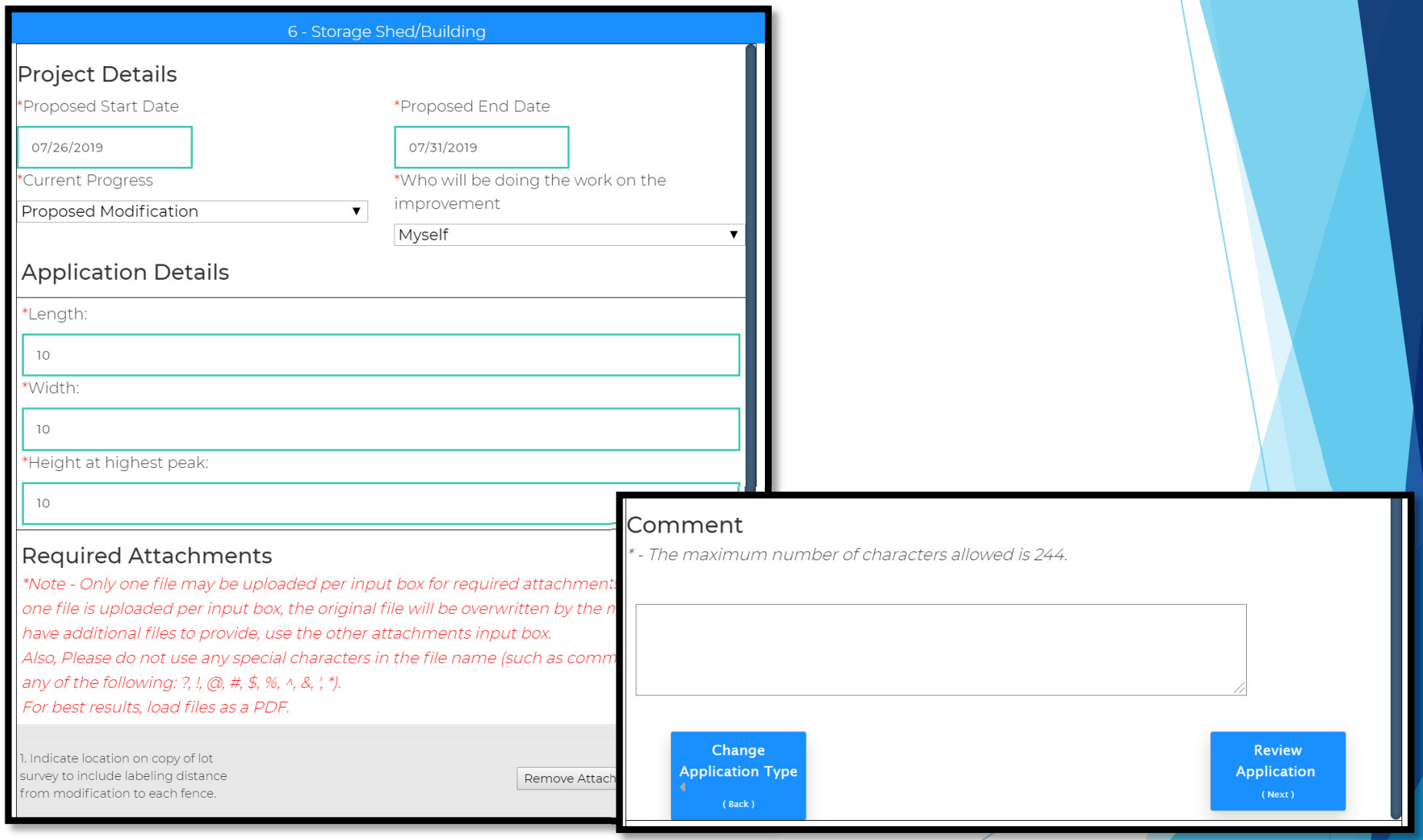
- After reviewing the documents, read the acceptance statement and check the box to confirm you agree to abide by the governing documents of the community. Click Select Application Type (Next).



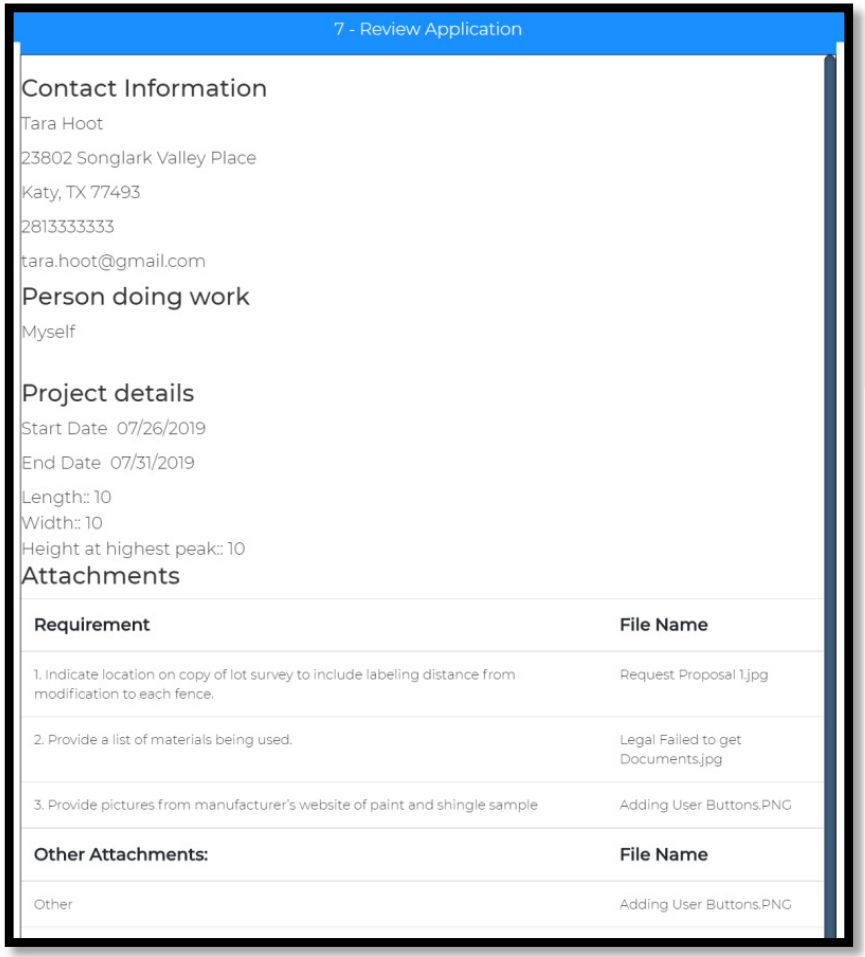
- Select the modification type for your project and click Application Details (Next).
- If you are applying for more than one modification, separate applications are required.

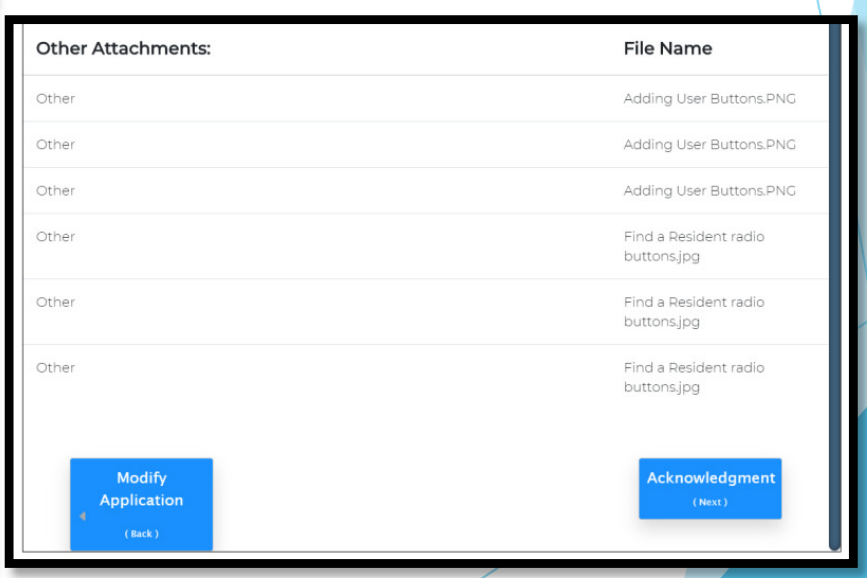


- All fields are required, including attachments.
- Enter all information and select Review Application (Next).

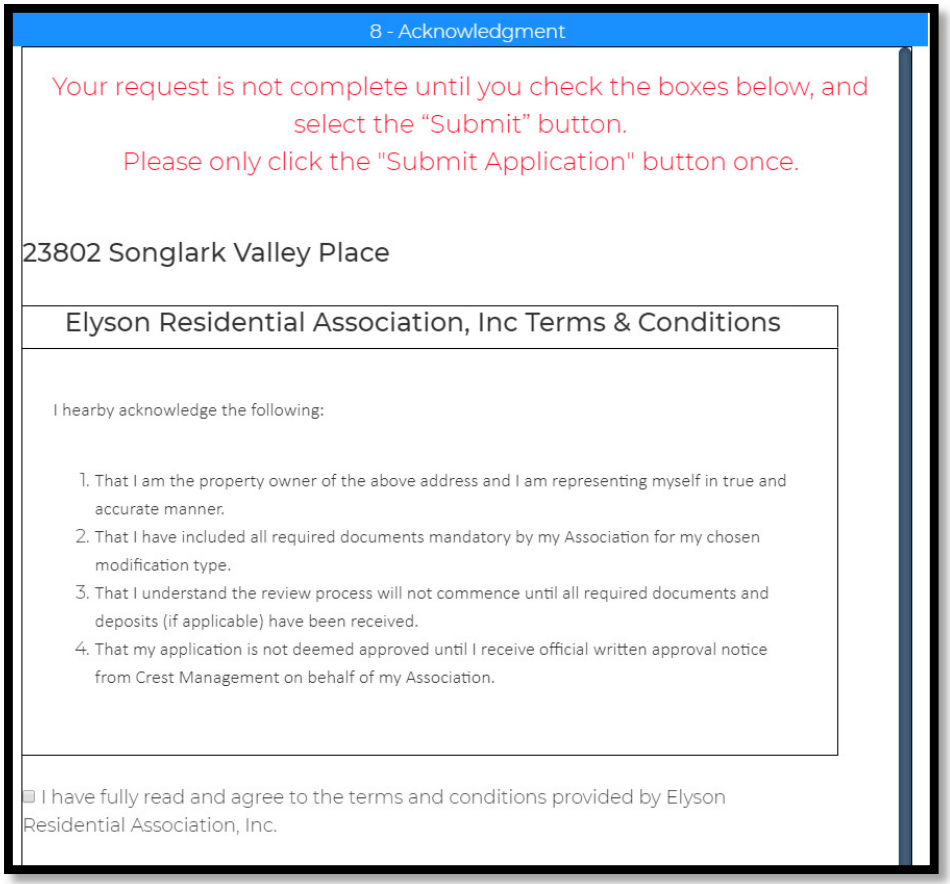


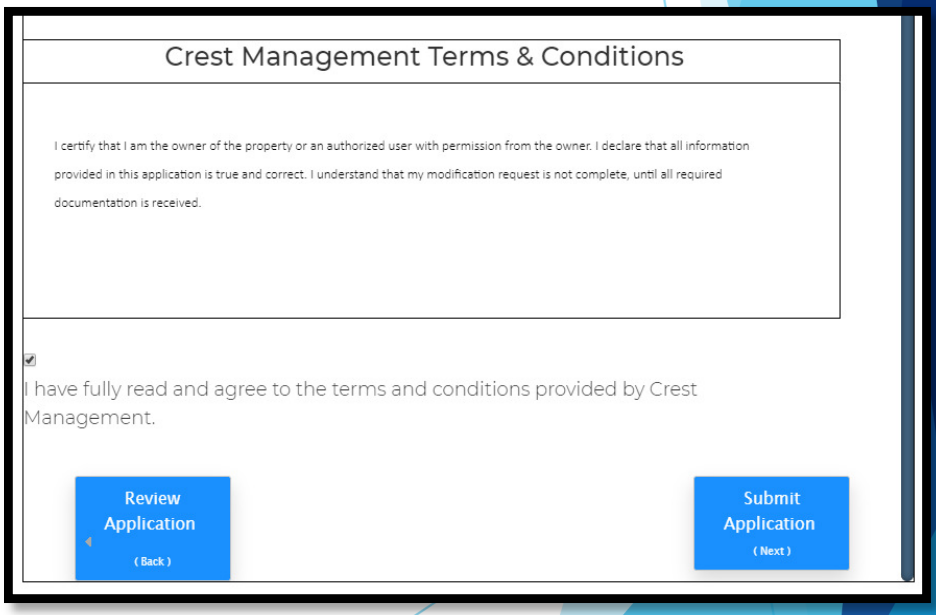
- Review your application to ensure all information is correct and that the required attachments are provided.
- If changes are needed, select Modify Application (Back).
- If everything is correct, select Acknowledgment (Next).



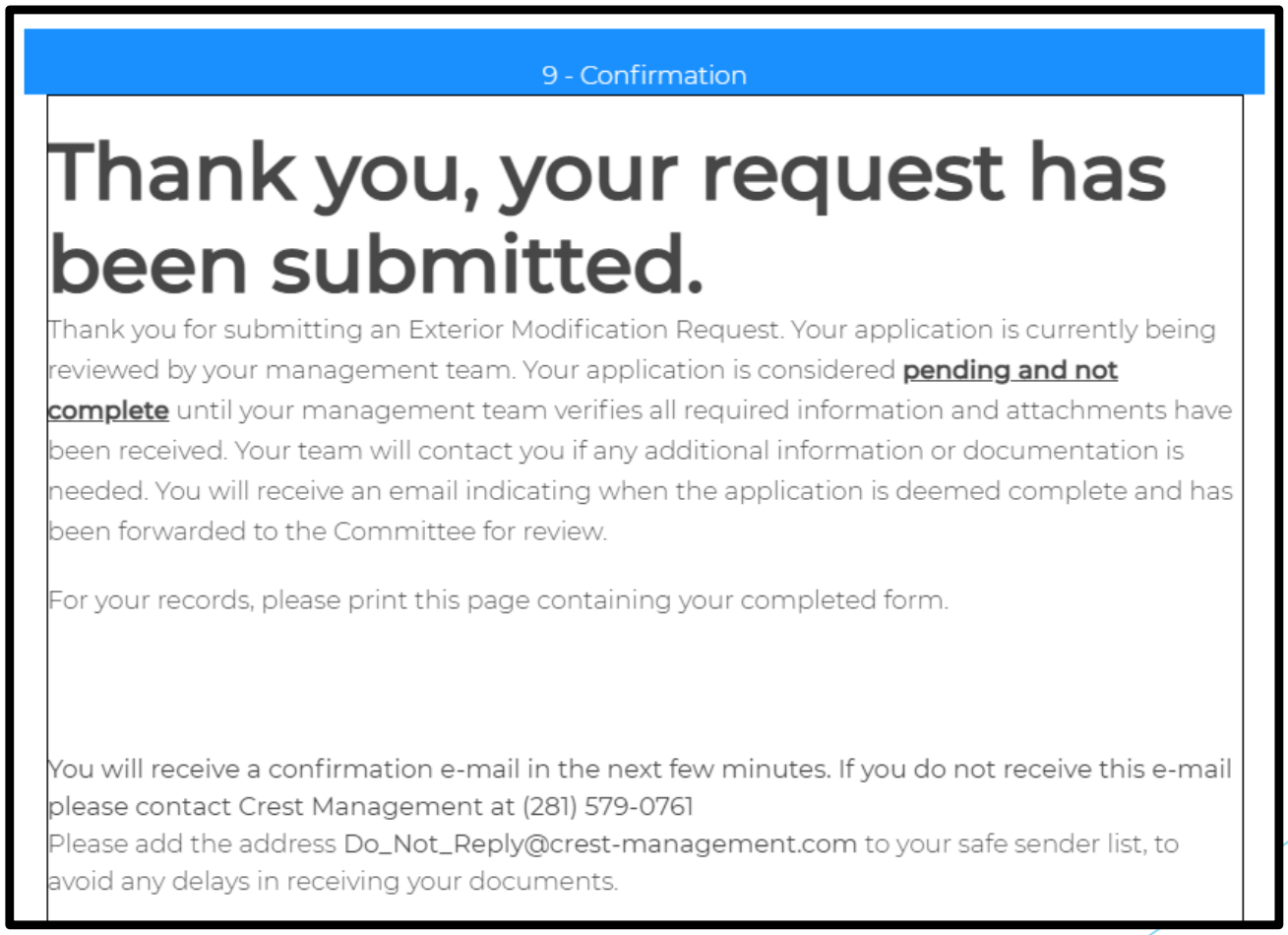


- Review the Terms and Conditions and check the two acknowledgment boxes to confirm you have fully read and agree.
- Select Submit Application (Next).

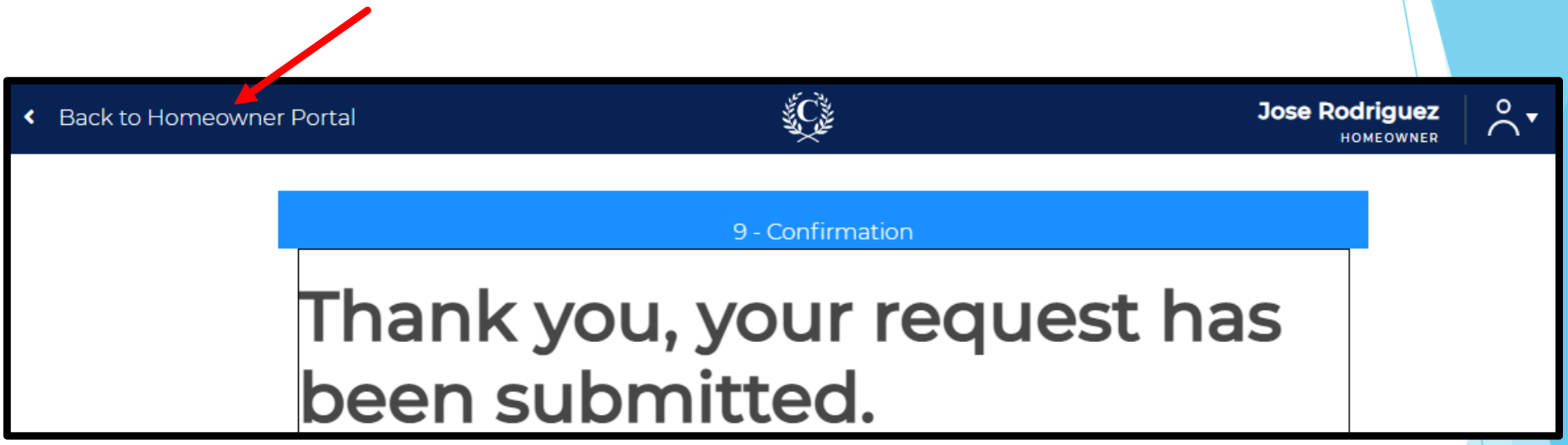




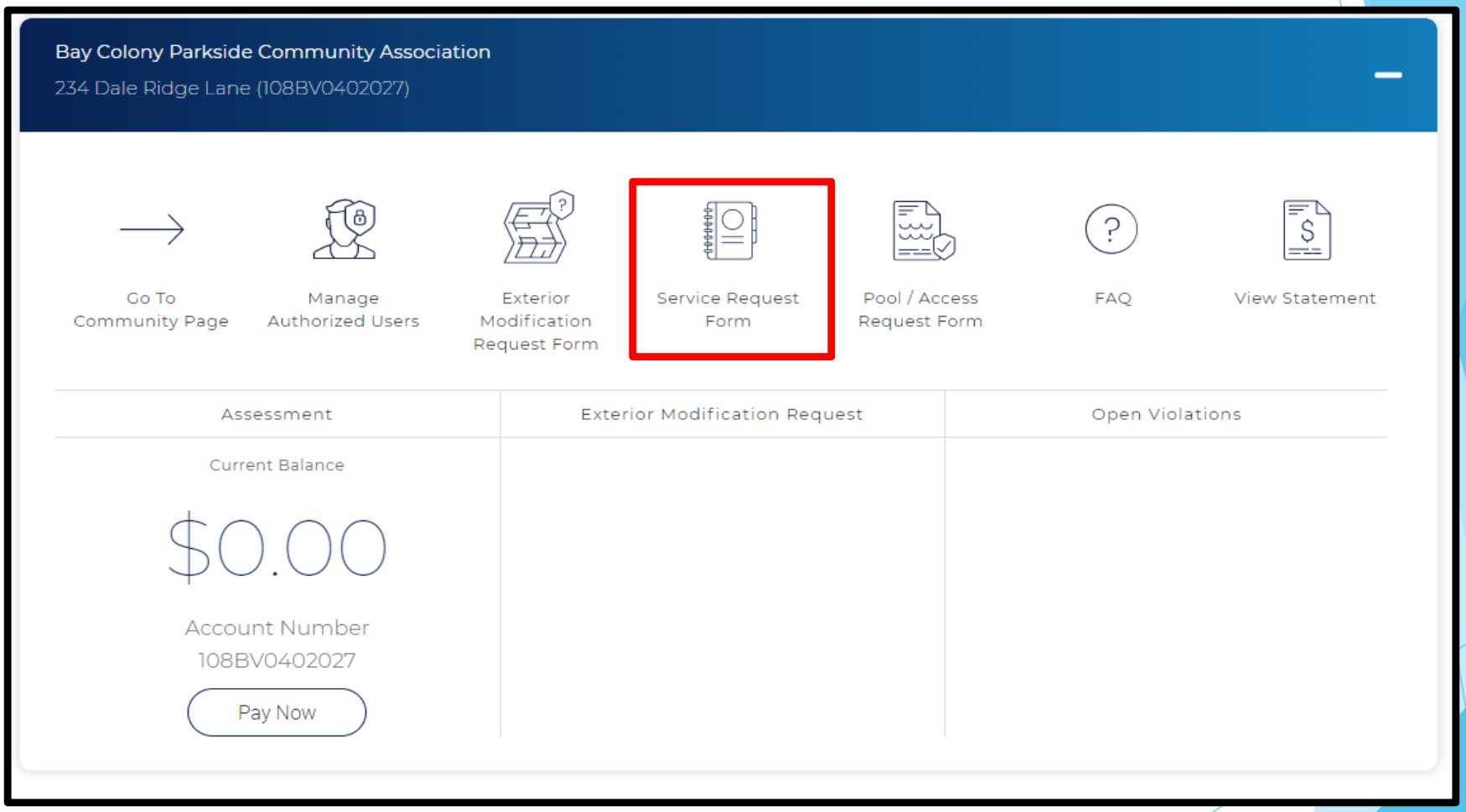
- You will see a confirmation message once your application has been submitted.
- You will also receive a confirmation email. If you do not receive the email, please contact your Crest Management team.



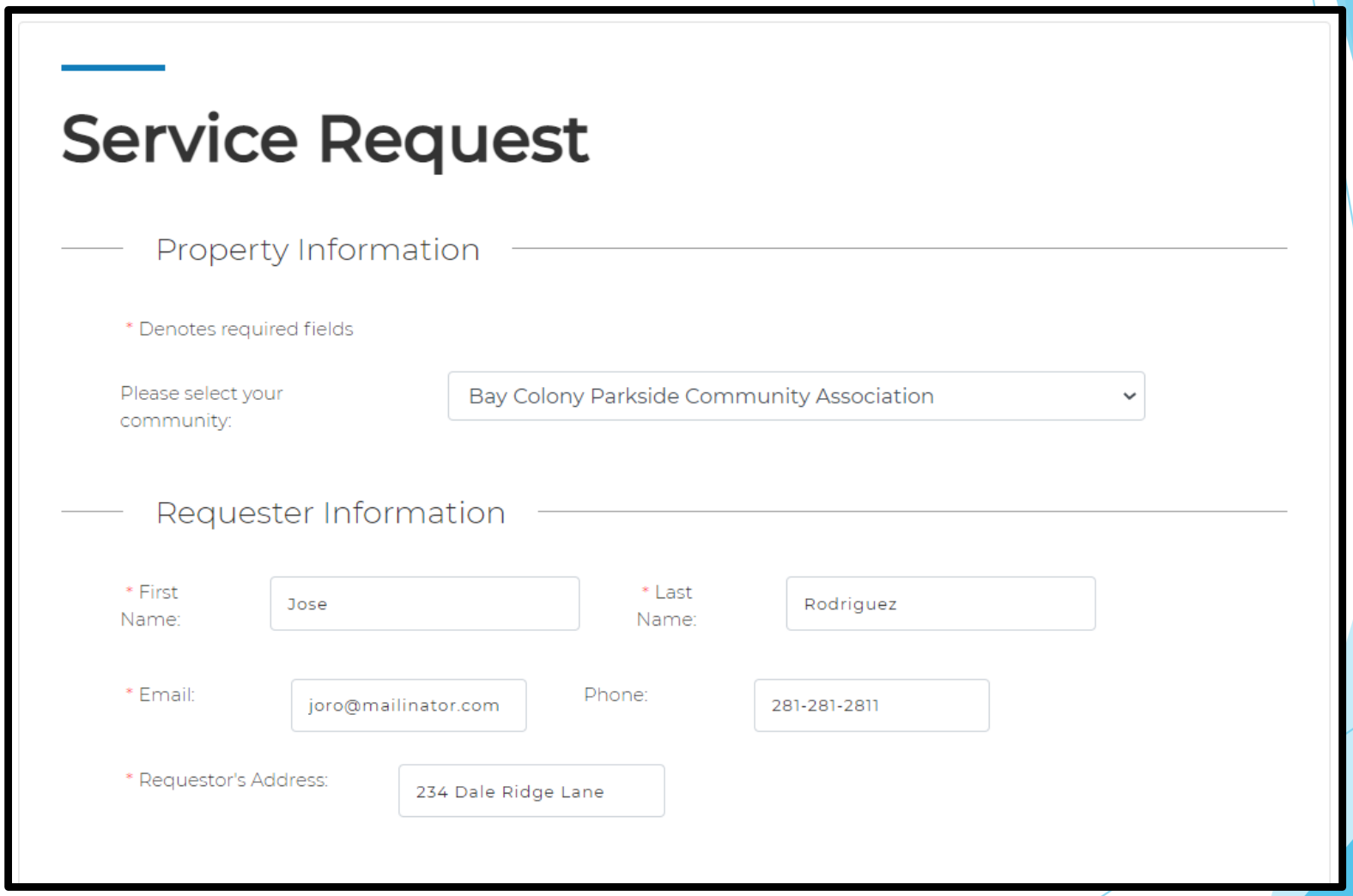
- Click Back to Homeowner Portal to return to your Homeowner Dashboard.



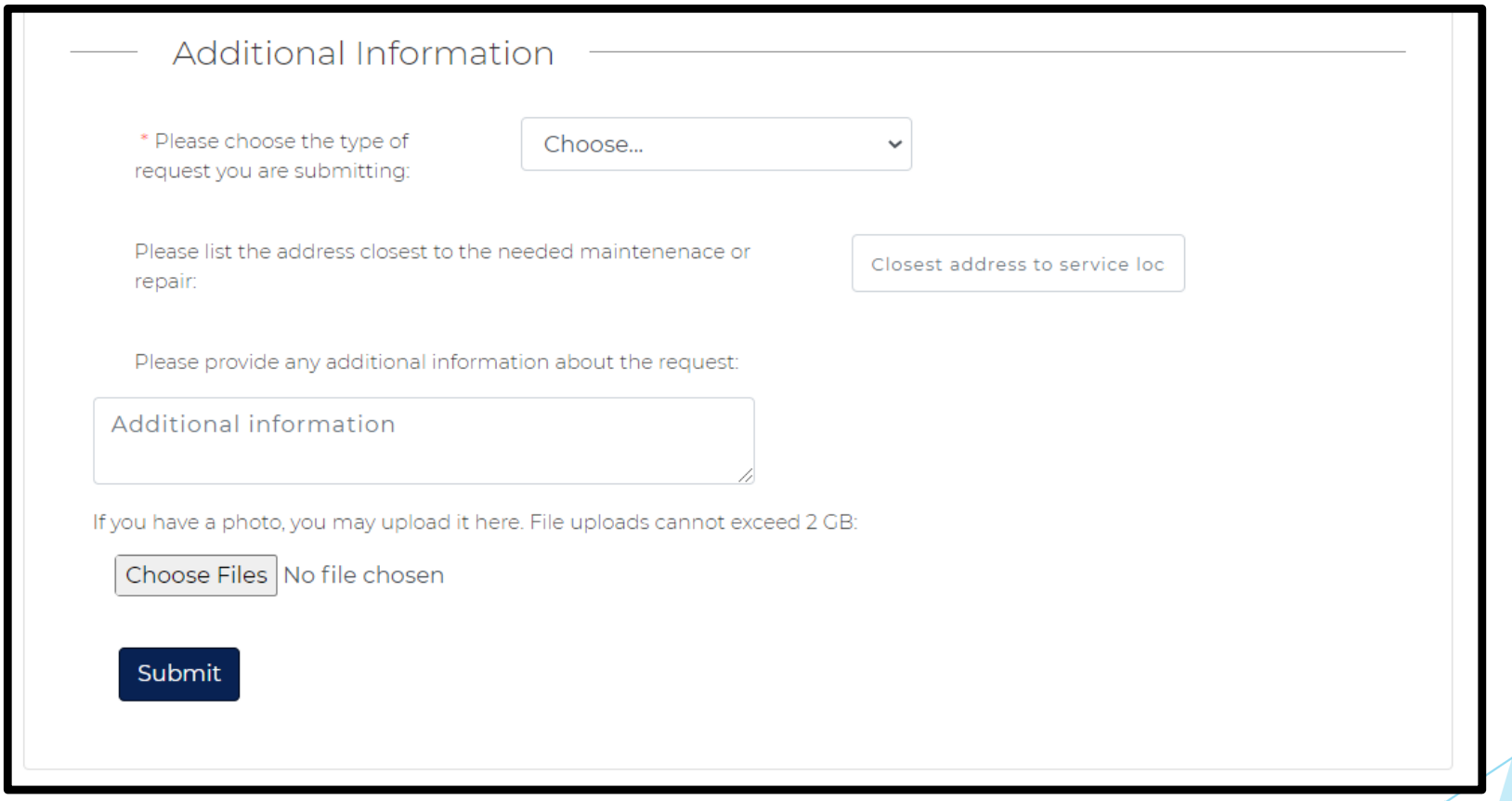
- Submit a Service Request to notify the Crest Management Team of maintenance issues, deed restriction violations, change of address, or anything else.



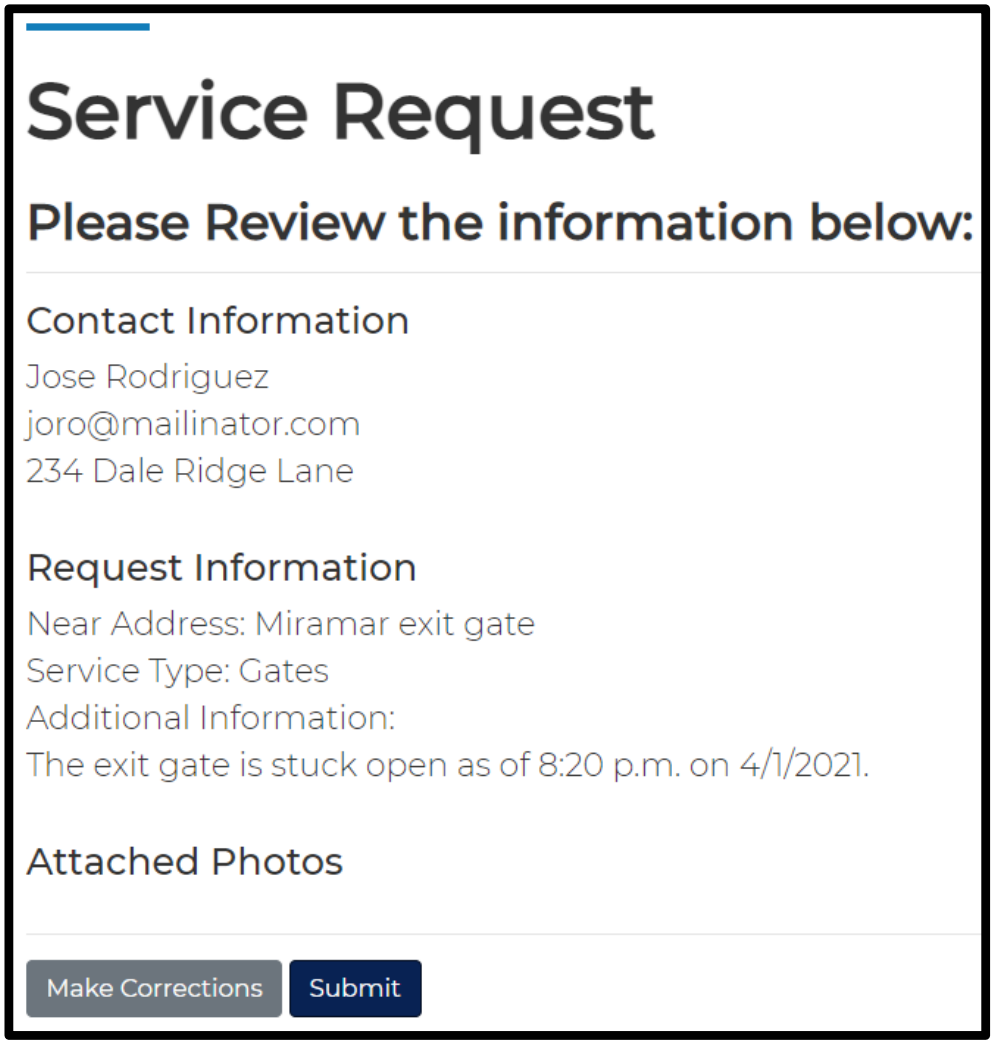
- The Property Information and Requester Information will be prefilled.



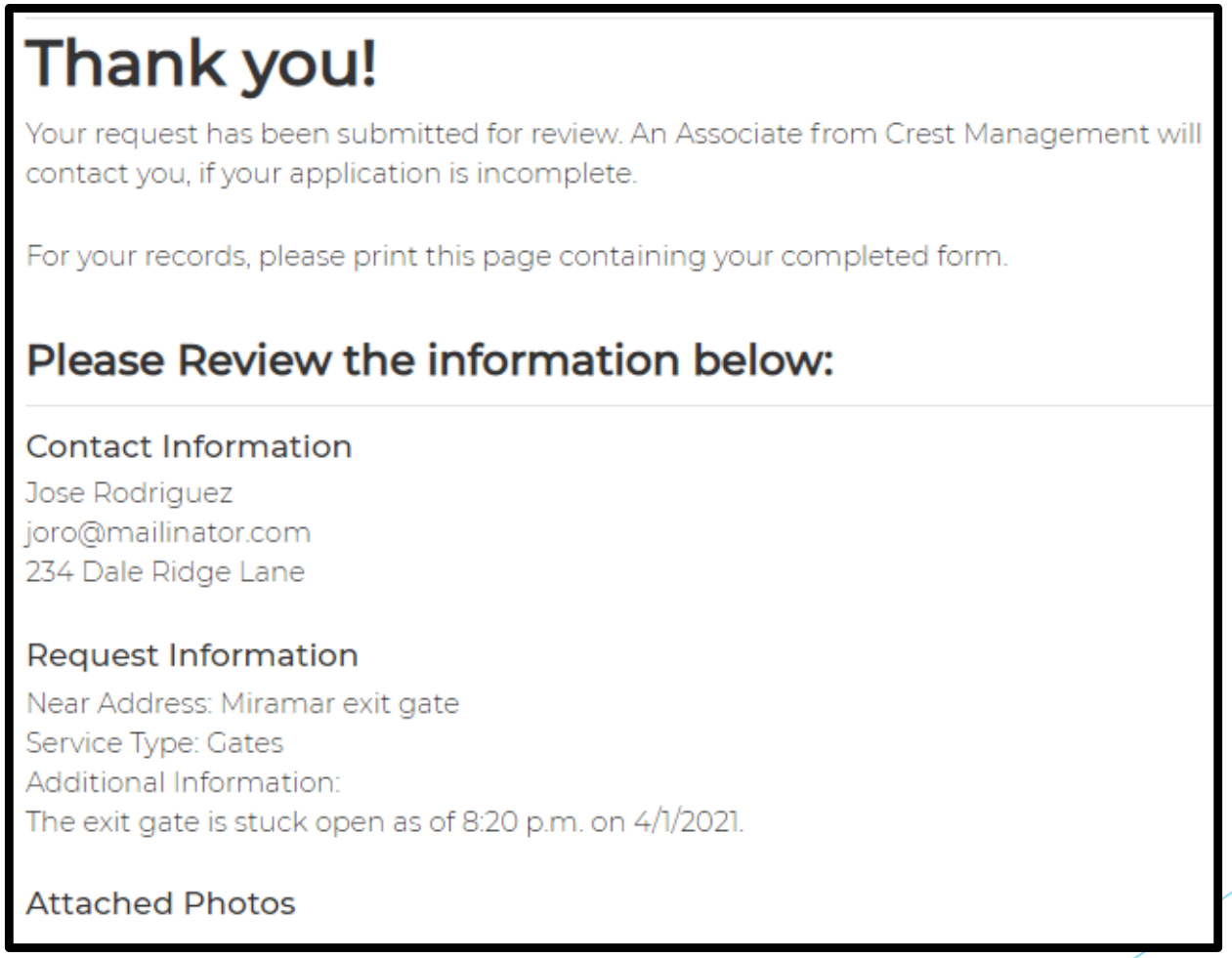
- Select the type of request, enter the closest address, if applicable, provide details, and upload a photo, if desired.
- Click Submit.



- Verify the information is correct and click Submit. If changes are necessary, click Make Corrections to go back.



- A confirmation message will appear letting you know your submission was successful. You will also receive a confirmation email.



Thank you!

Your request has been submitted for review. An Associate from Crest Management will contact you, if your application is incomplete.

For your records, please print this page containing your completed form.

Please Review the information below:

Contact Information

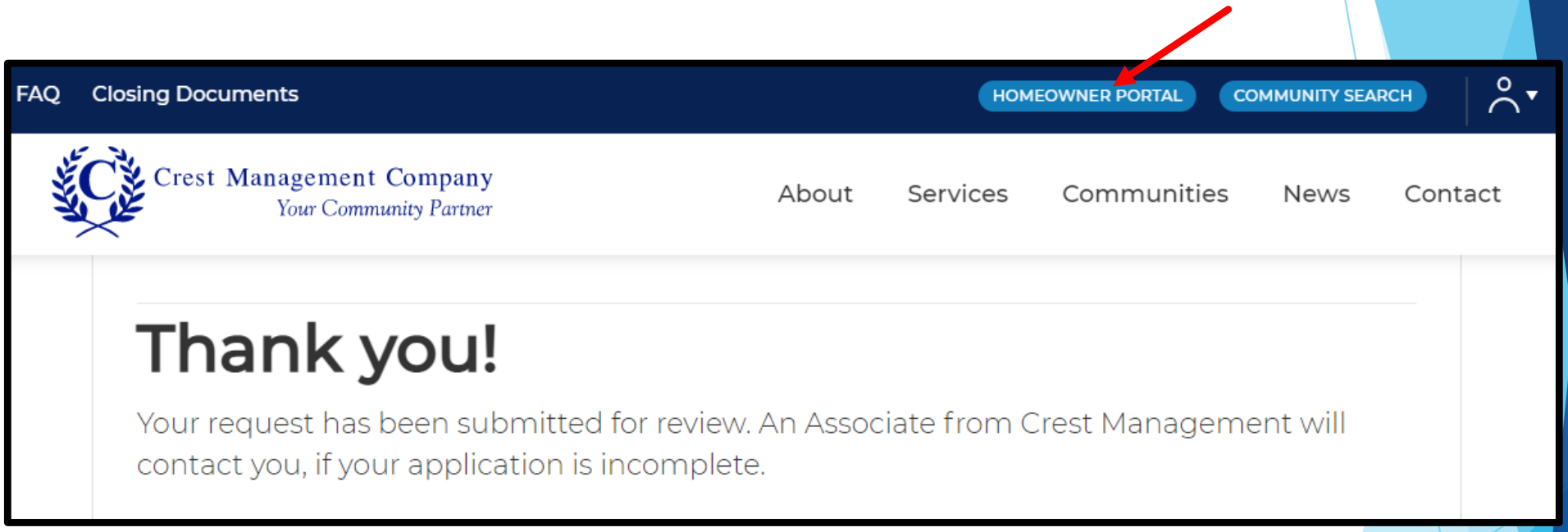
Jose Rodriguez
joro@mailinator.com
234 Dale Ridge Lane

Request Information

Near Address: Miramar exit gate
Service Type: Gates
Additional Information:
The exit gate is stuck open as of 8:20 p.m. on 4/1/2021.

Attached Photos

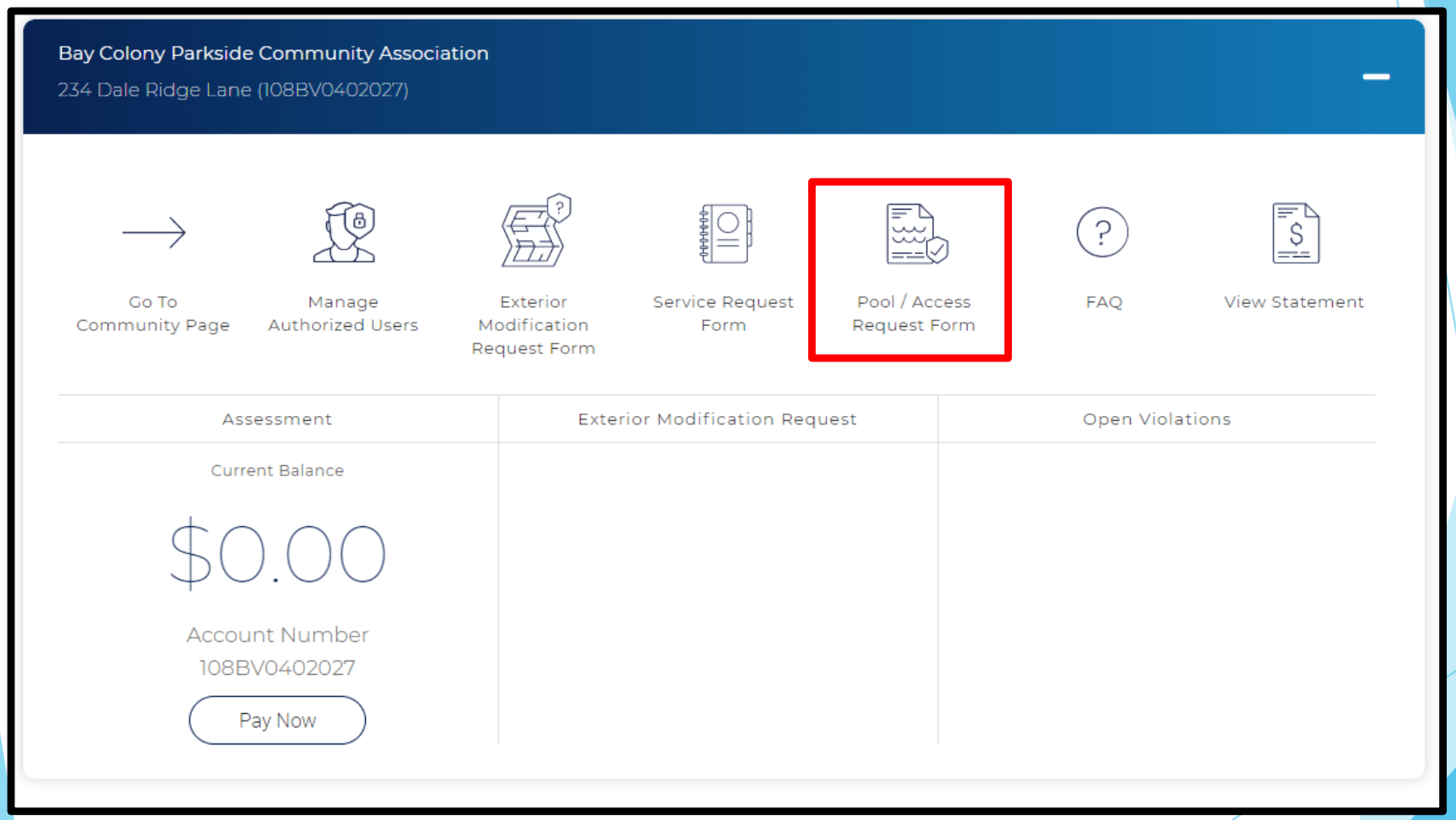
- Click Homeowner Portal to return to your Homeowner Dashboard.



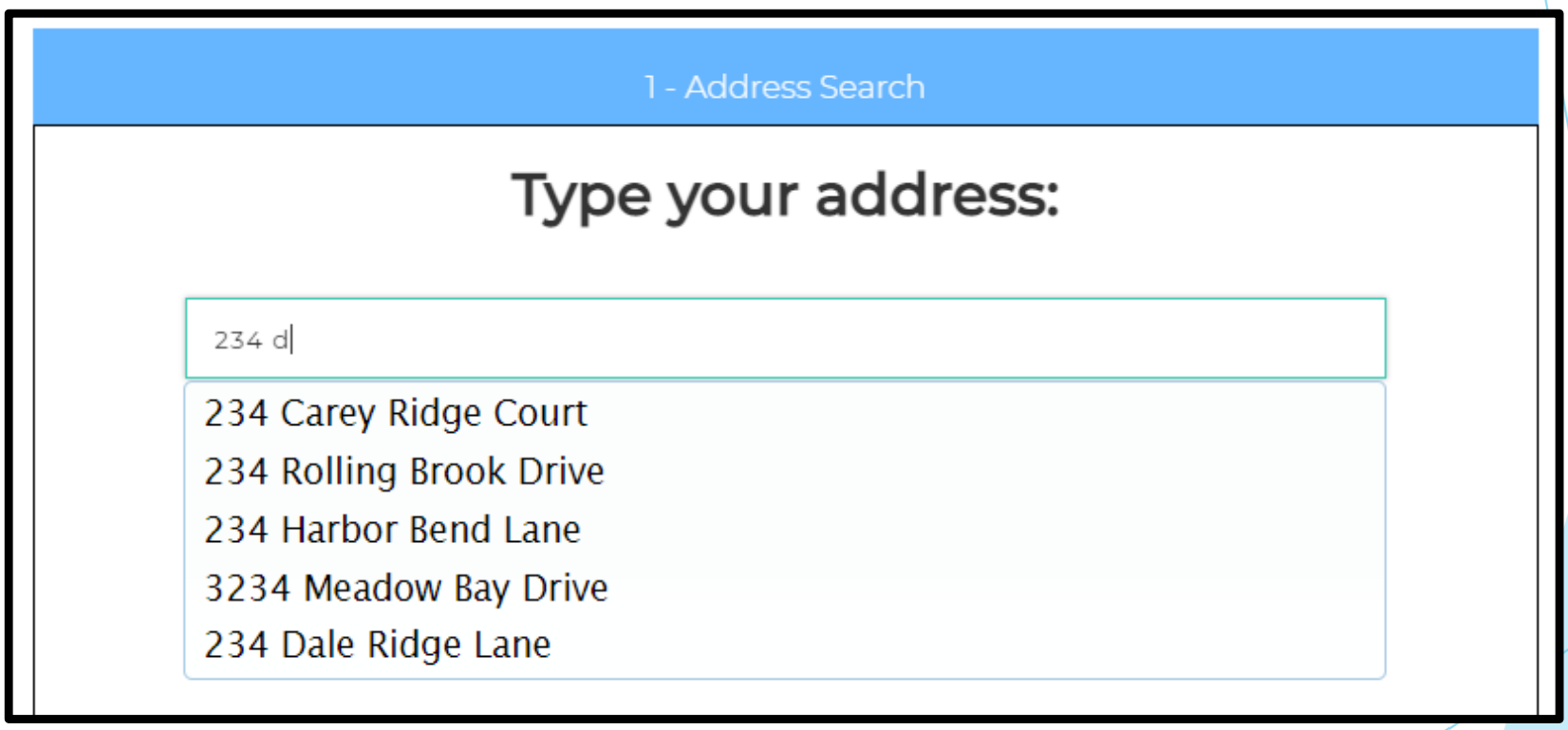
Pool/Access Request Form

- Use the pool/access request form to obtain amenity access.

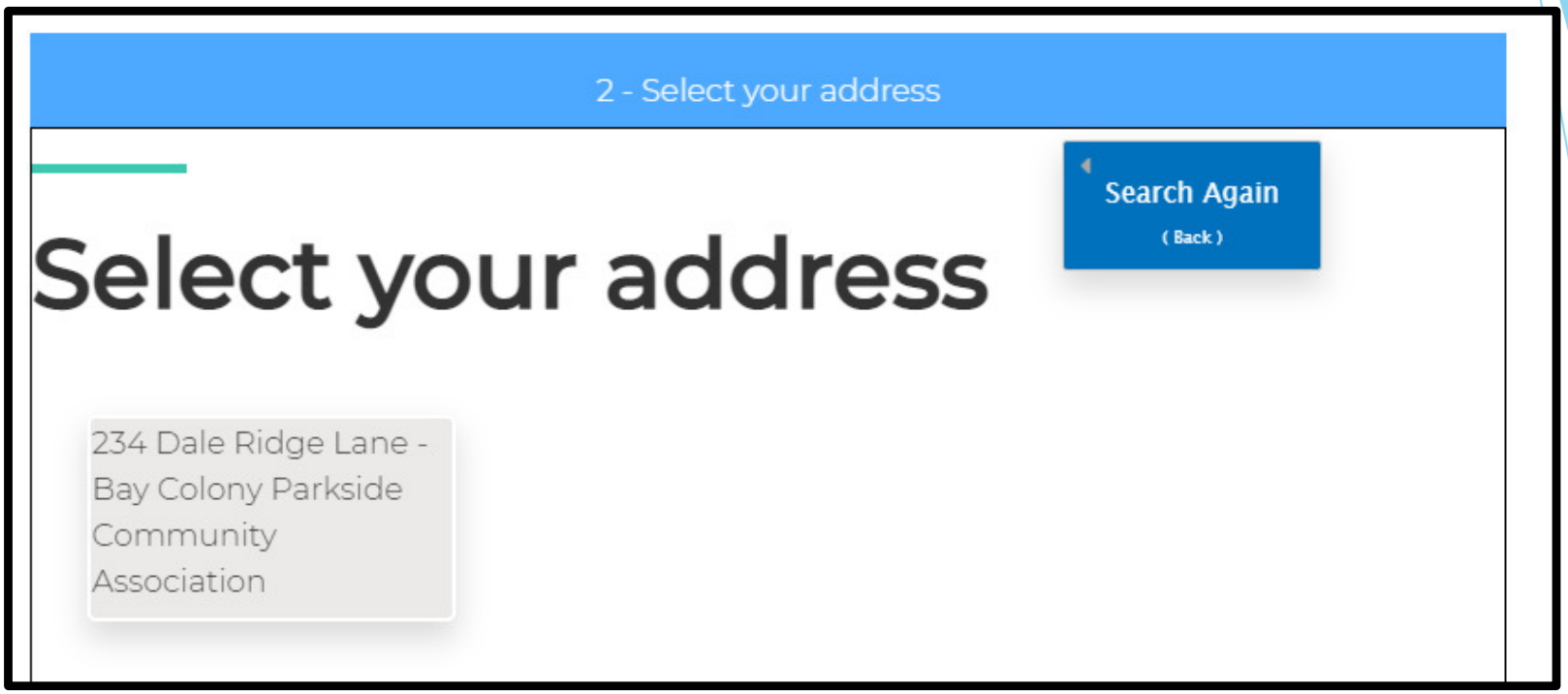
  **If your community does not have amenities or handles access in another manner, you will be notified once you click on this.*



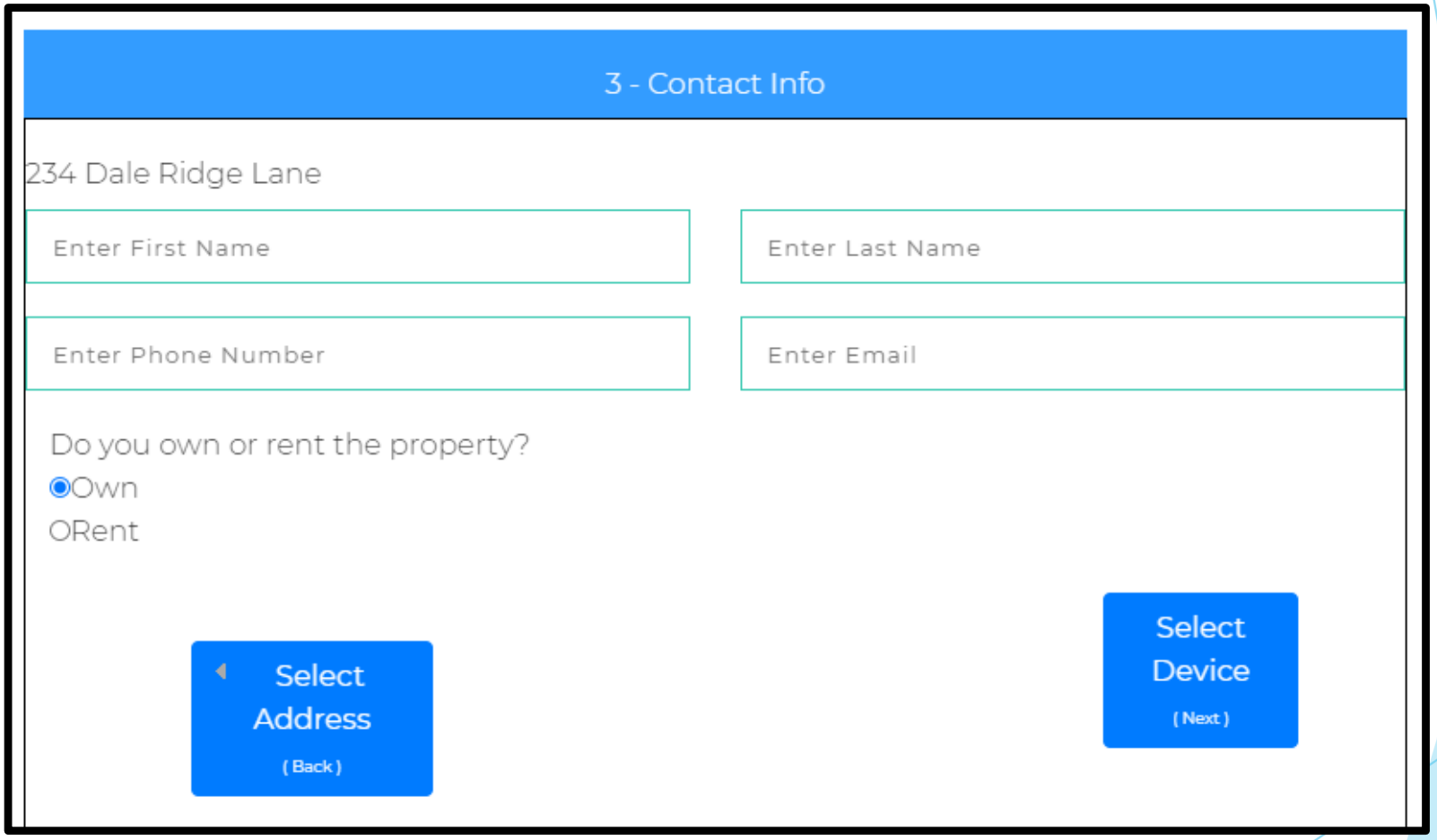
- Begin typing the numerical portion of your address. A list of matching options will appear. If you do not see your address, begin typing the street name. The list will continue to reduce as you type. Once you see your address, click on it.
- Click Find Address



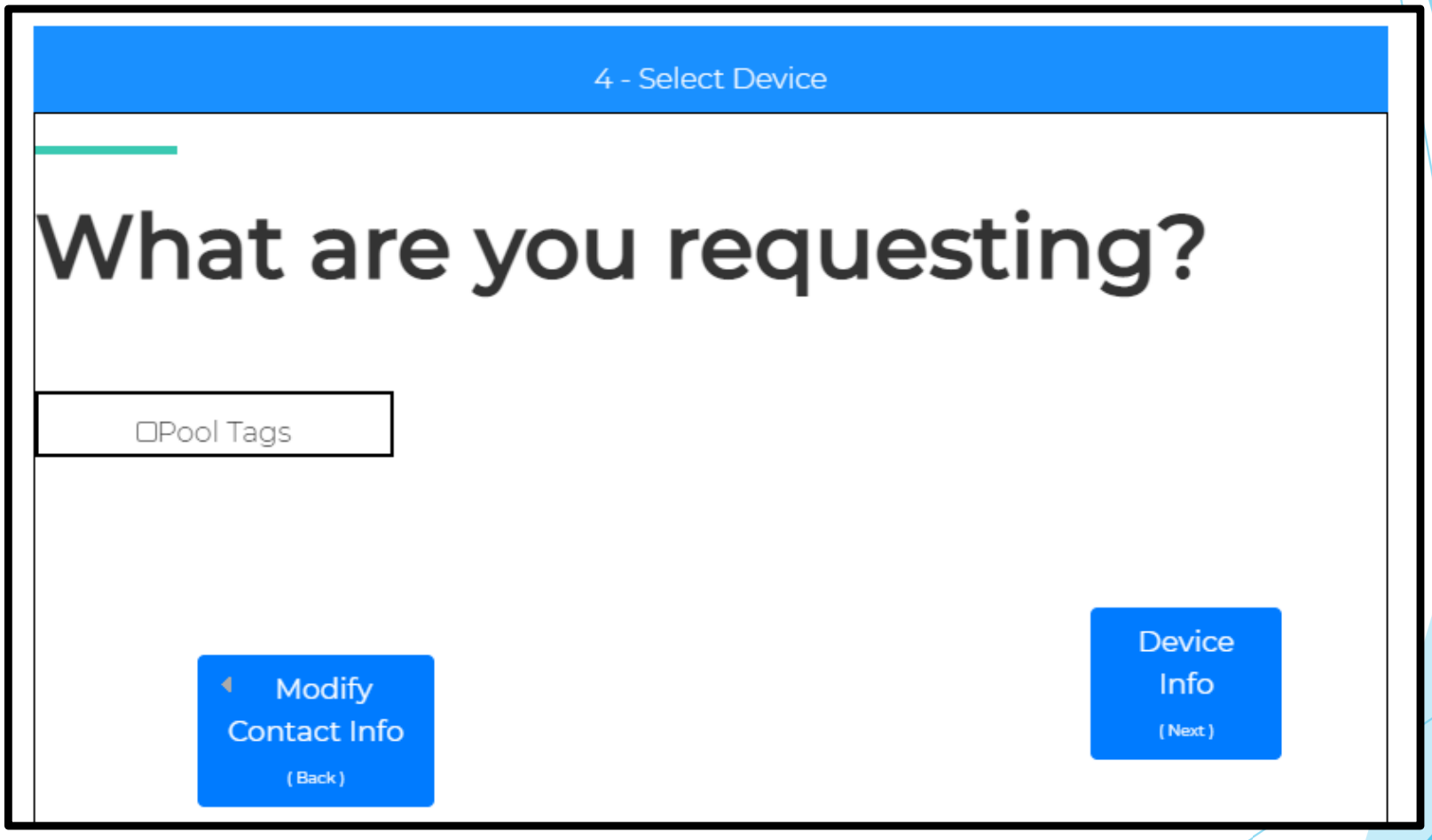
- Click on your address to select it.



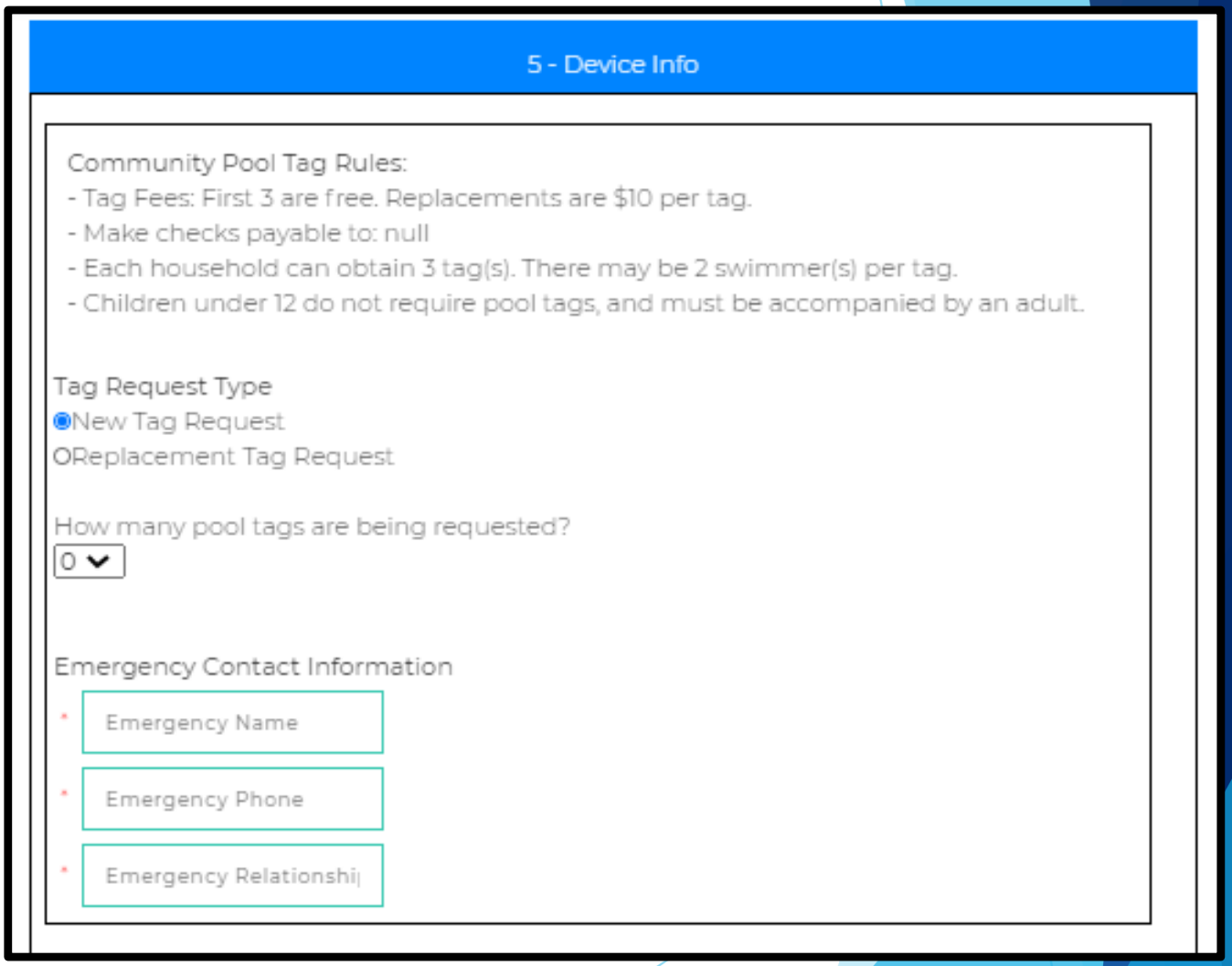
- Complete all fields and click Select Device (Next). If rent is selected, additional fields will populate. Complete those fields before clicking Select Device (Next).



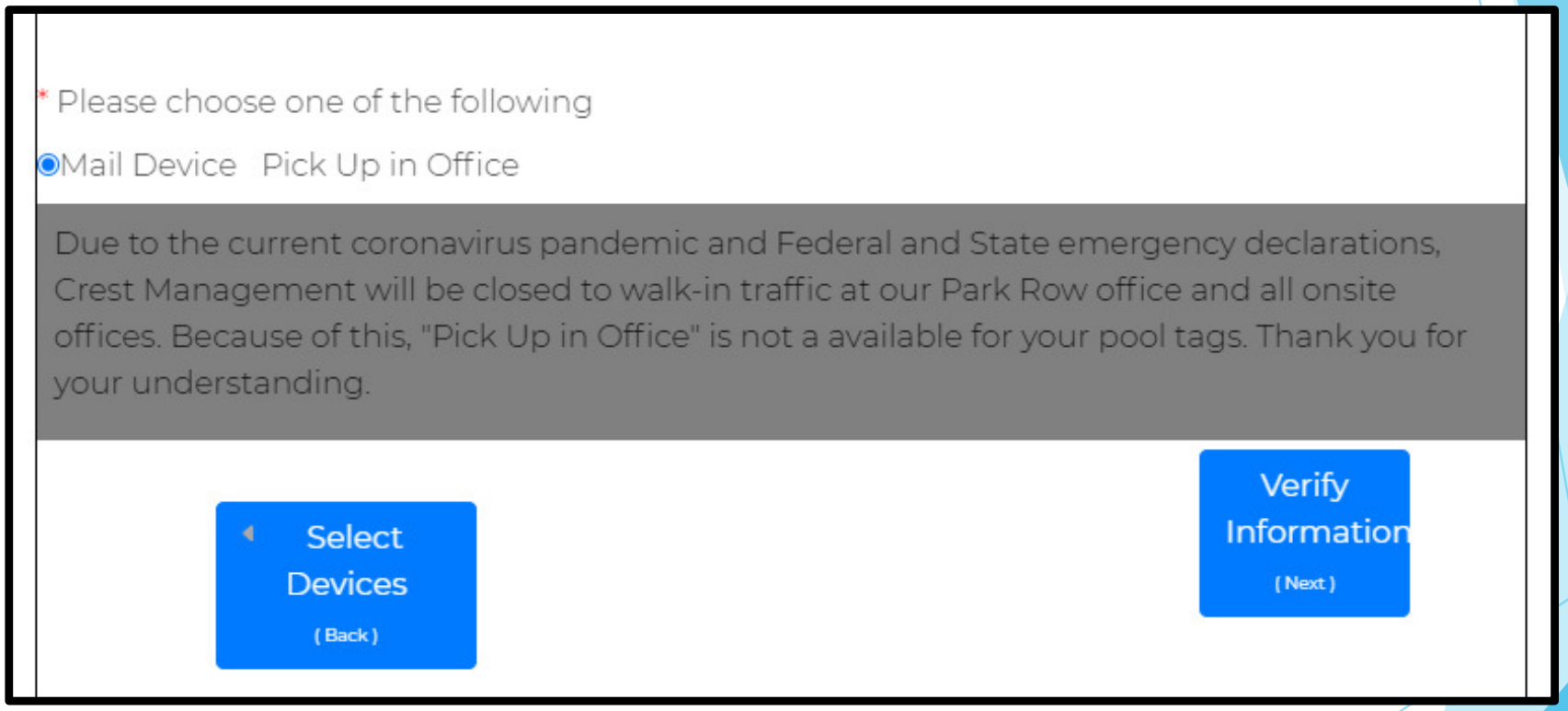
- Check the box for the device you are requesting and click Device Info (Next).



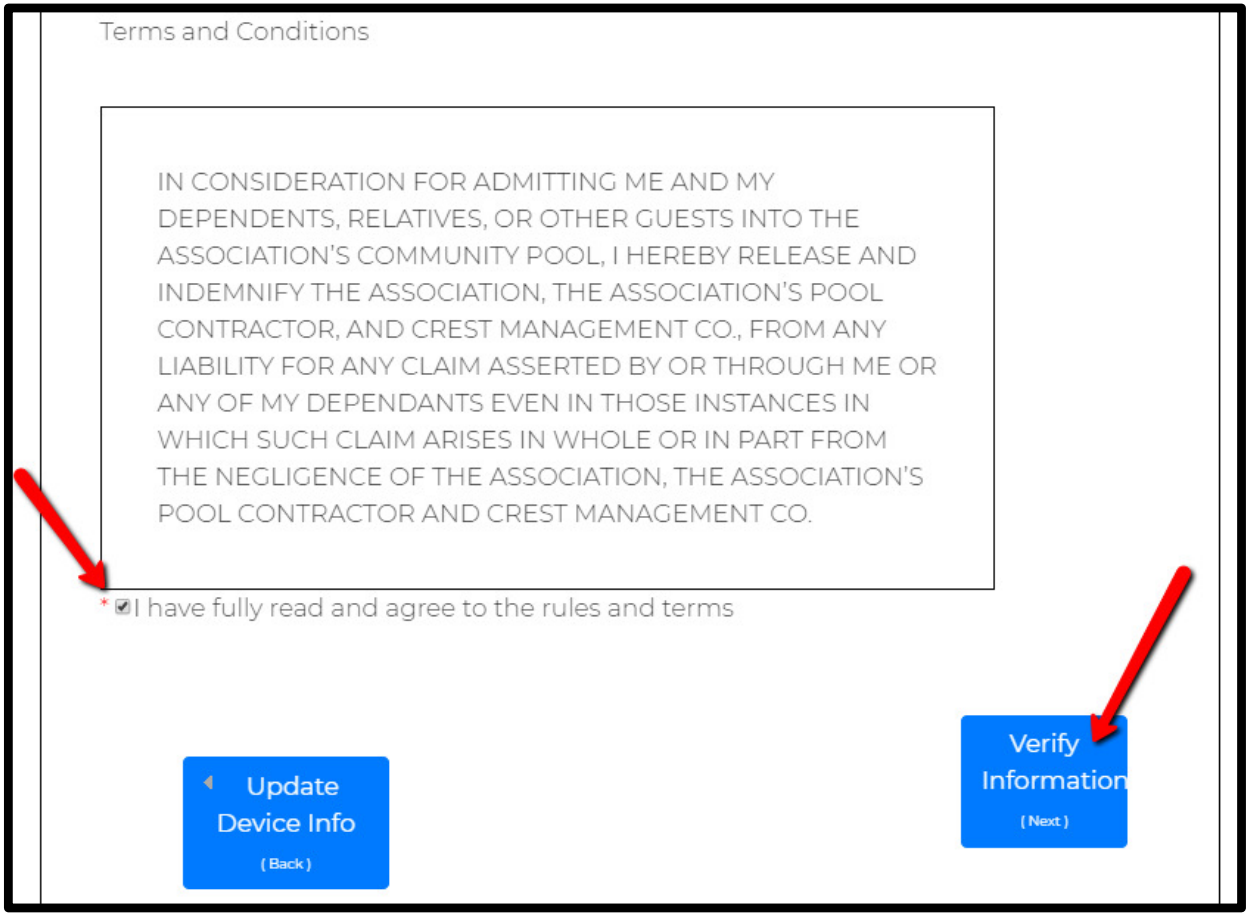
- Review the Community Pool Tag Rules to determine how many tags you should request.
- Select whether you are requesting New Tags or Replacement Tags.
- Select the number of tags you are requesting.
- Complete all emergency contact fields.



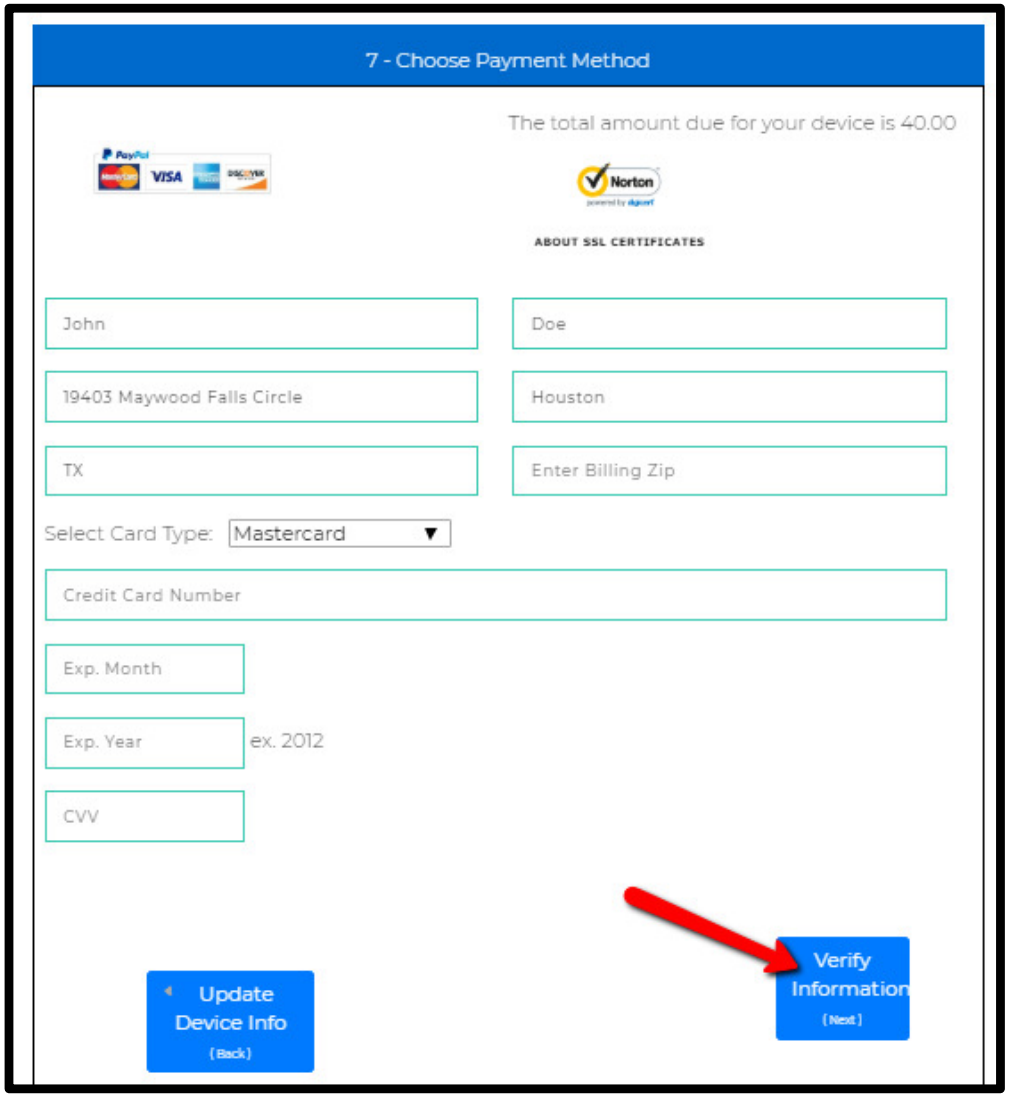
- Select either Mail Device or Pick Up In Office. There is a $20.00 charge to pick up in office.
- Click the blue button in the lower right to move to the next step. The wording on this button will vary per community based on whether there is a waiver, an associated charge, etc.



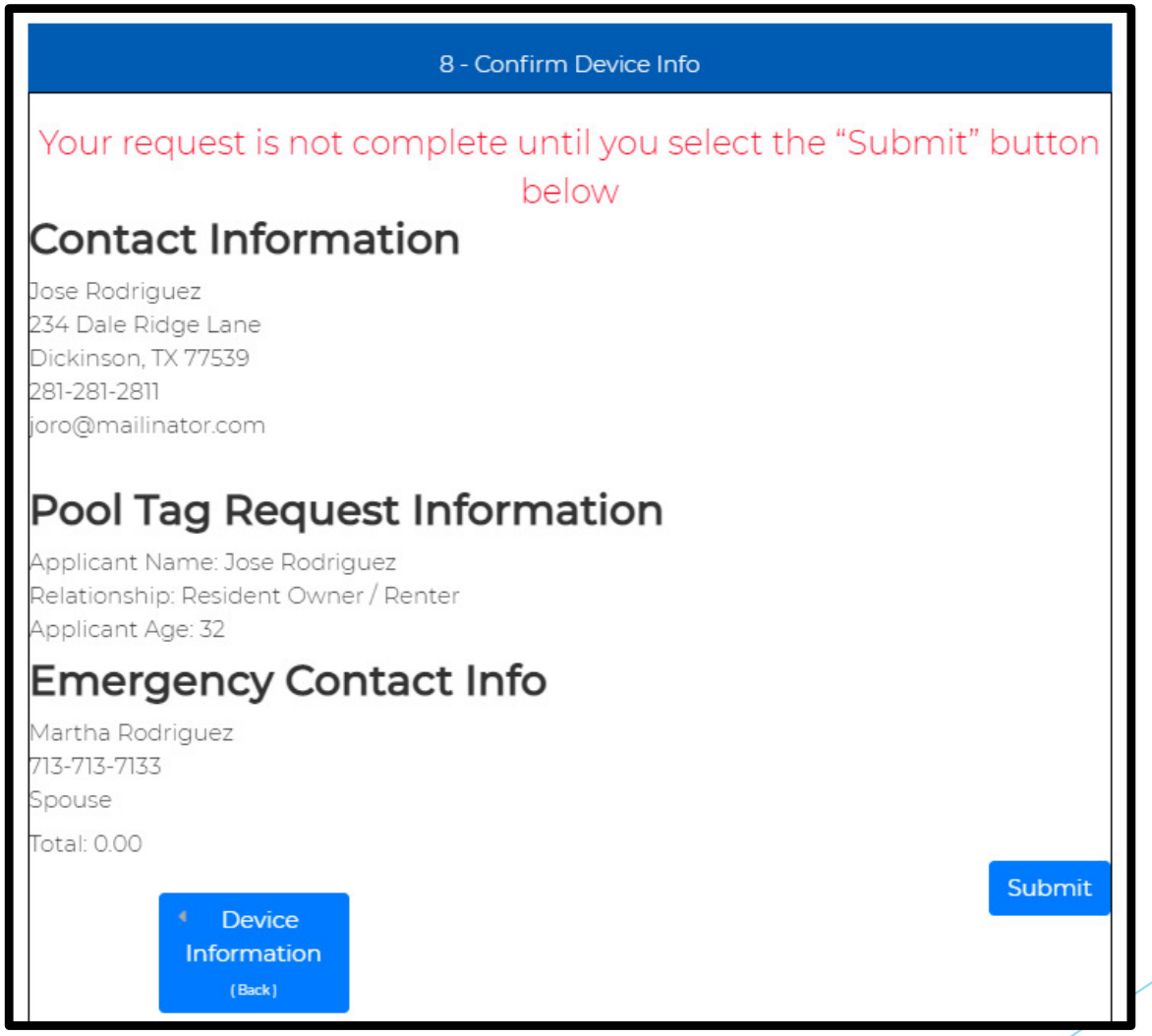
- If your community has a waiver, review the waiver and terms and conditions. Check the box to confirm you agree and click Verify Information (Next).



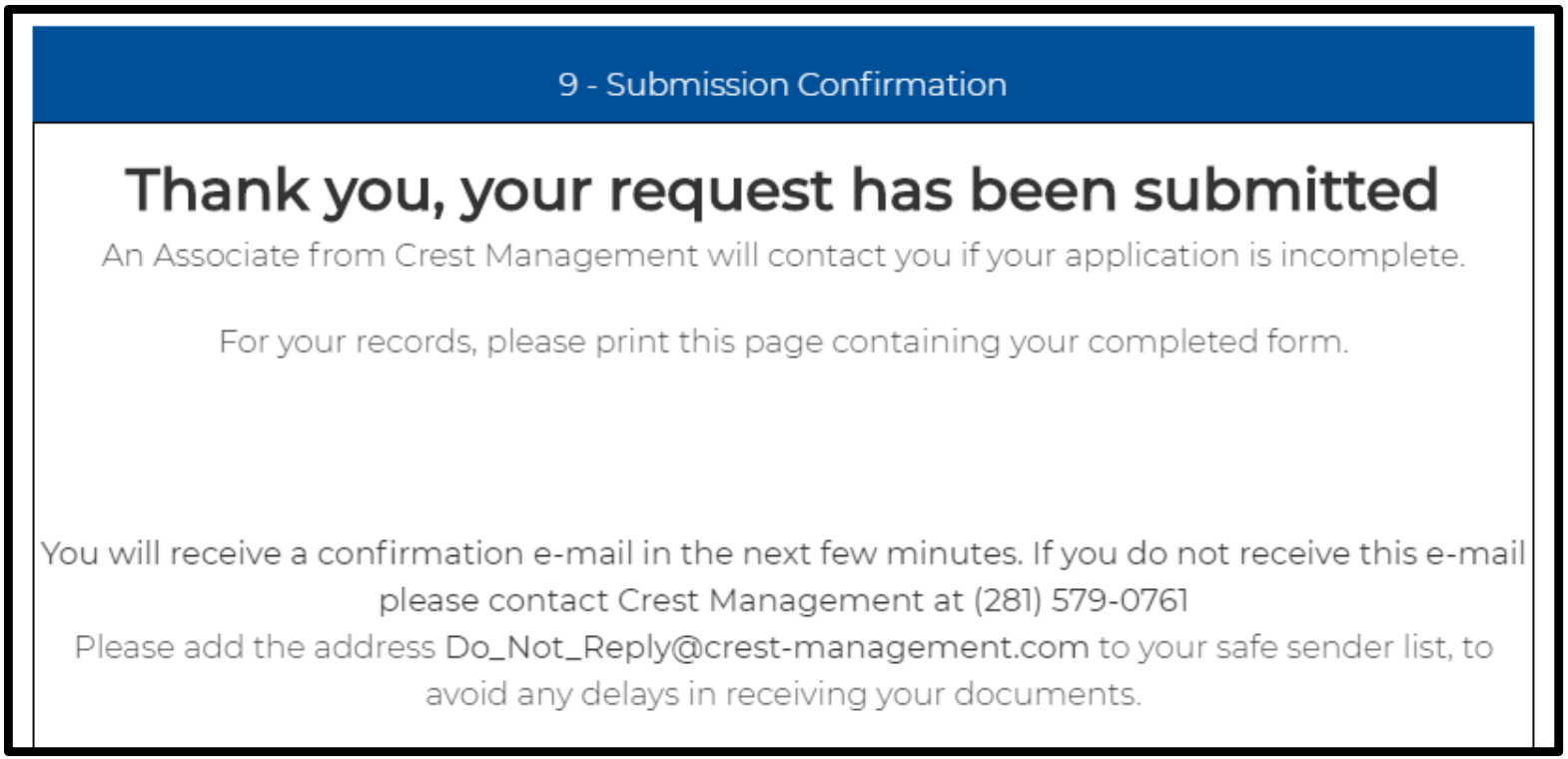
- If payment is required, complete all fields and click Verify Information (Next).



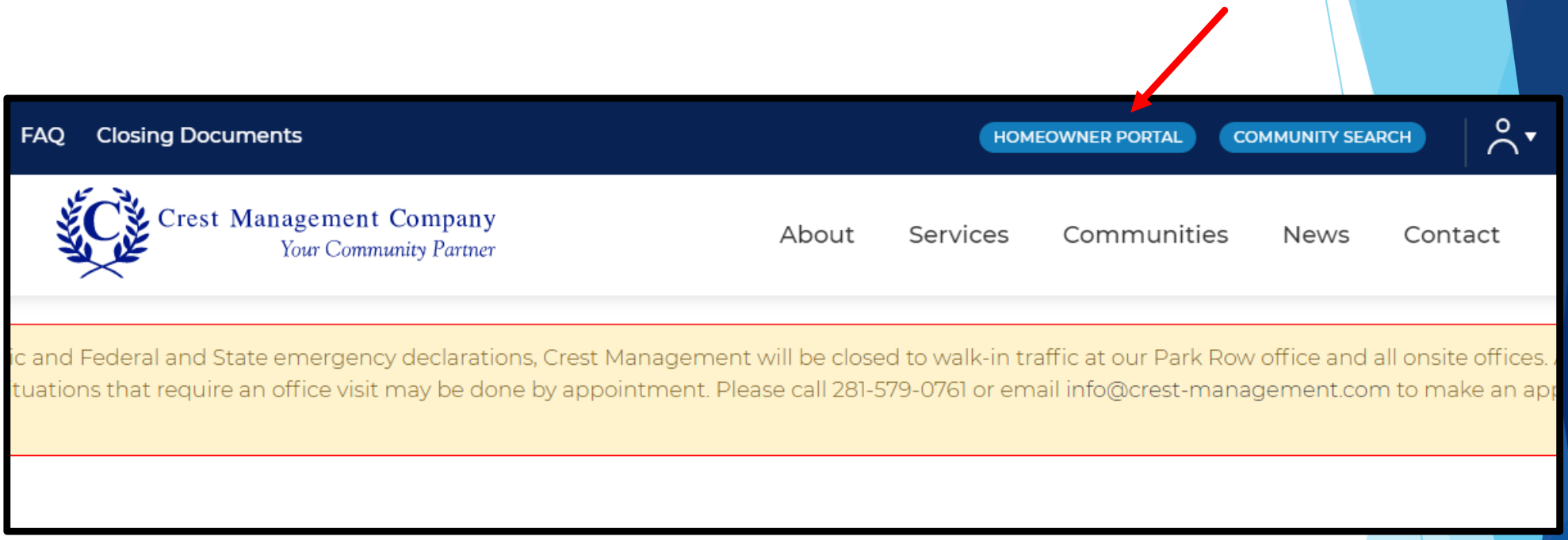
- Review all information for accuracy and click Submit. If corrections are needed, click Device Information (Back) and go back as many pages as needed to make corrections.



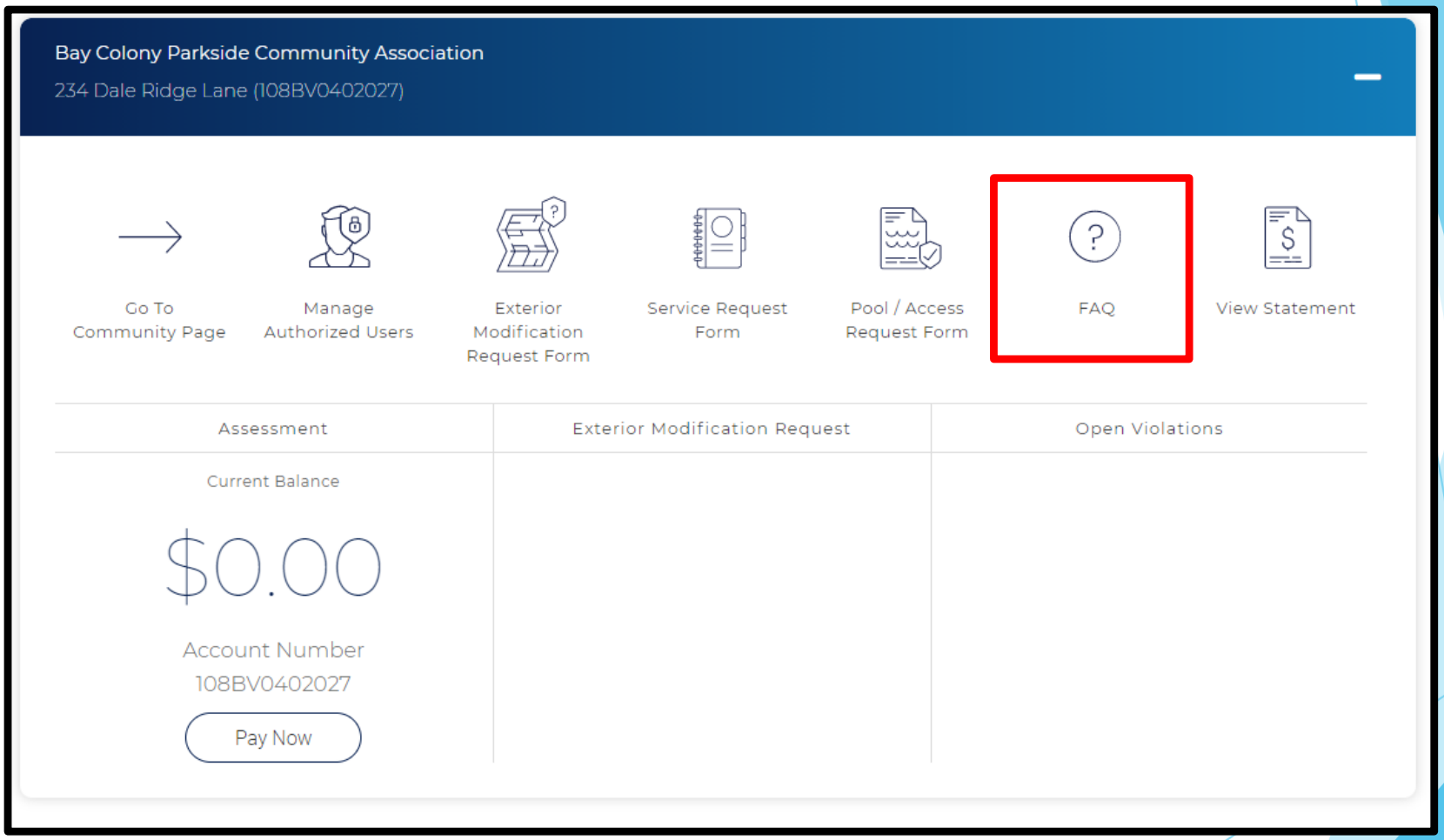
- A confirmation message will appear letting you know your submission was successful. You will also receive a confirmation email.



- Click Homeowner Portal to return to your Homeowner Dashboard.



- Check out the Frequently Asked Questions for answers on tons of topics.



- Click the category name or + to expand the list of questions.

FAQs

Your Questions Answered!

Here is a list of commonly asked questions to help you! Just click on one of the questions below to see the answer.

Homeowners Association Basics

Crest Management

Board of Directors +

Accounting/Assessments +

Exterior Modification Requests +

Deed Restrictions +

Board Meetings +

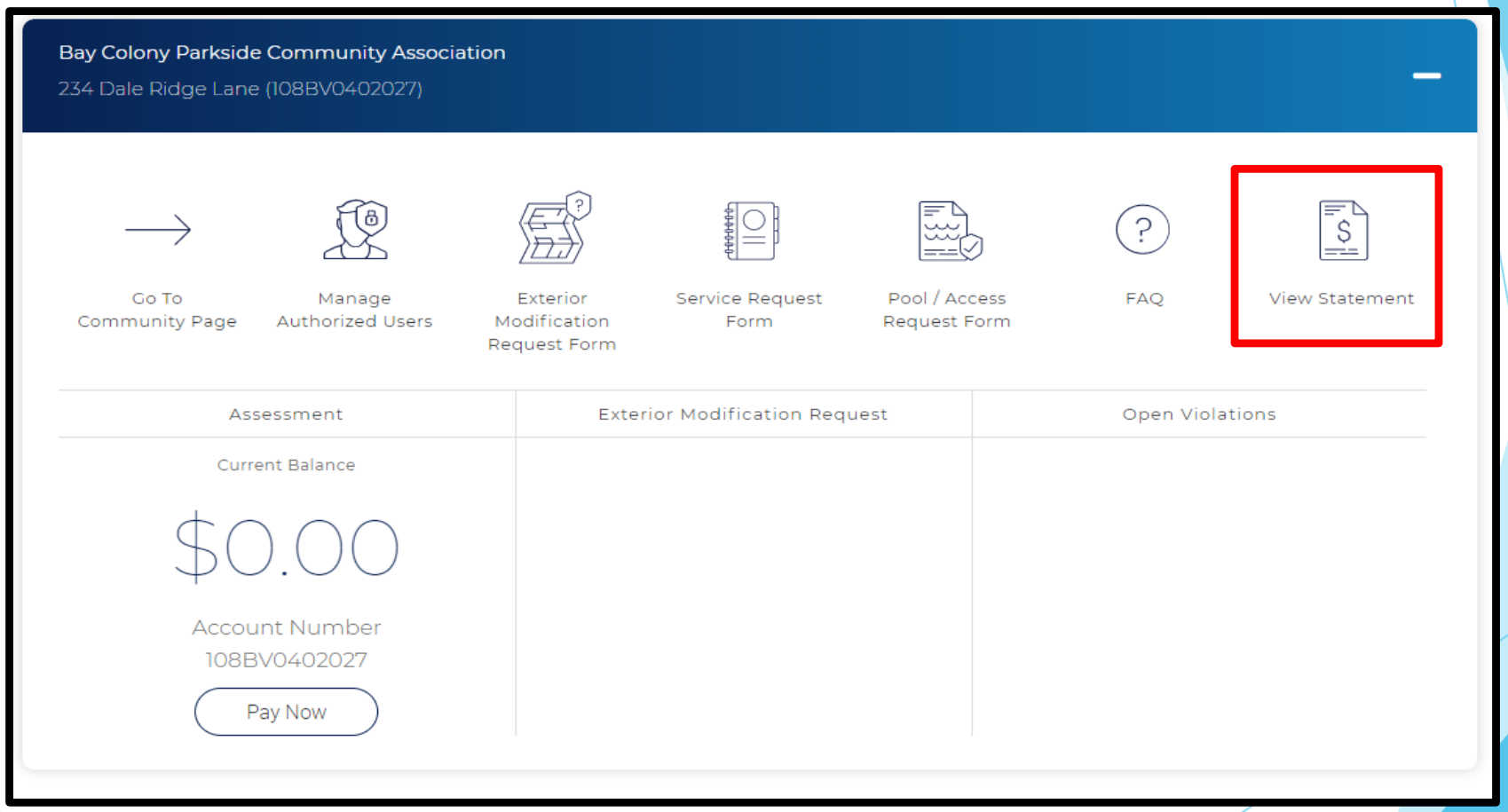
Website/Homeowner Portal +

General Information +

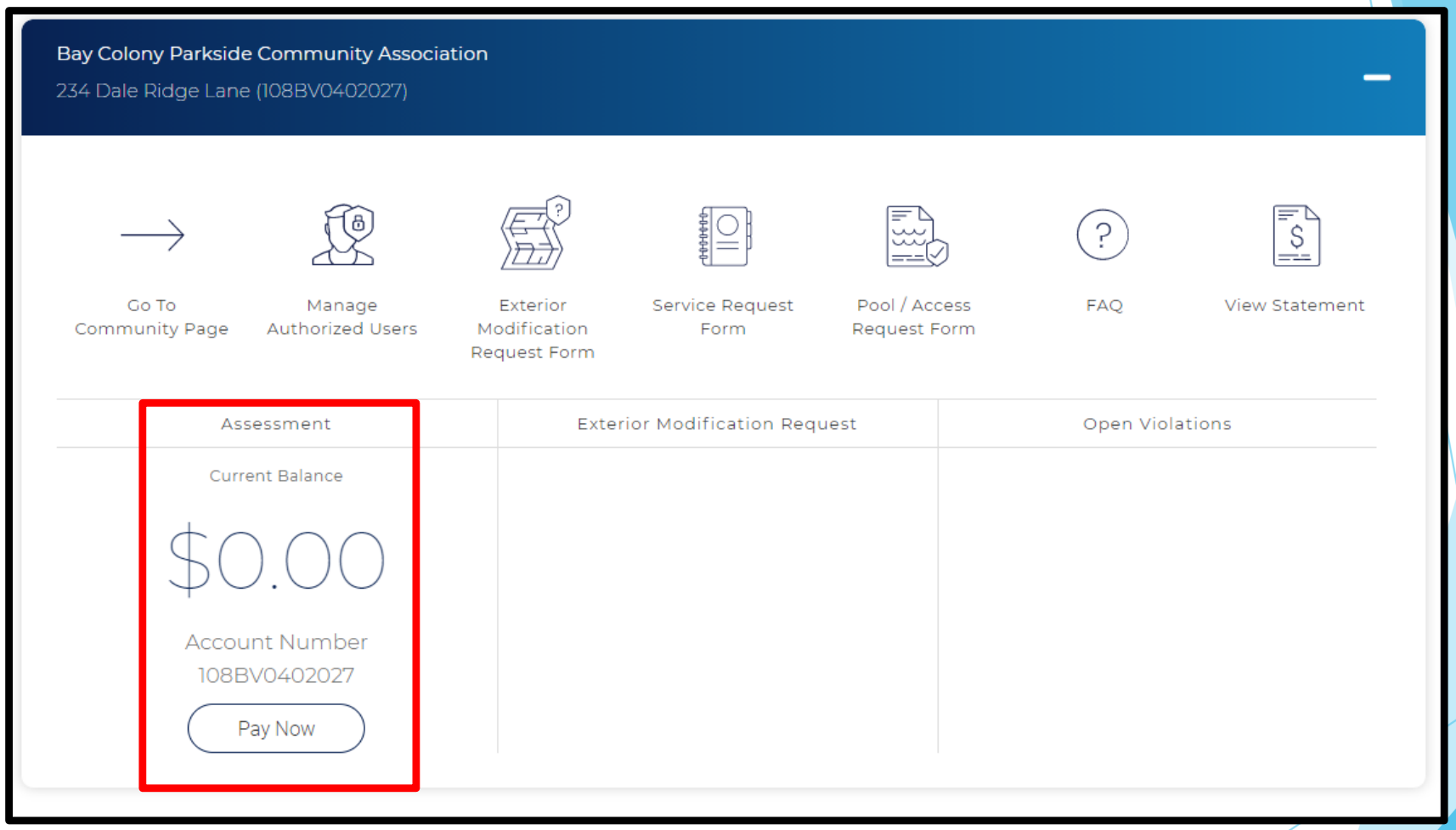
- Click Homeowner Portal to return to your Homeowner Dashboard.

- Click View Statement to download your current statement. Locate the download to open it.

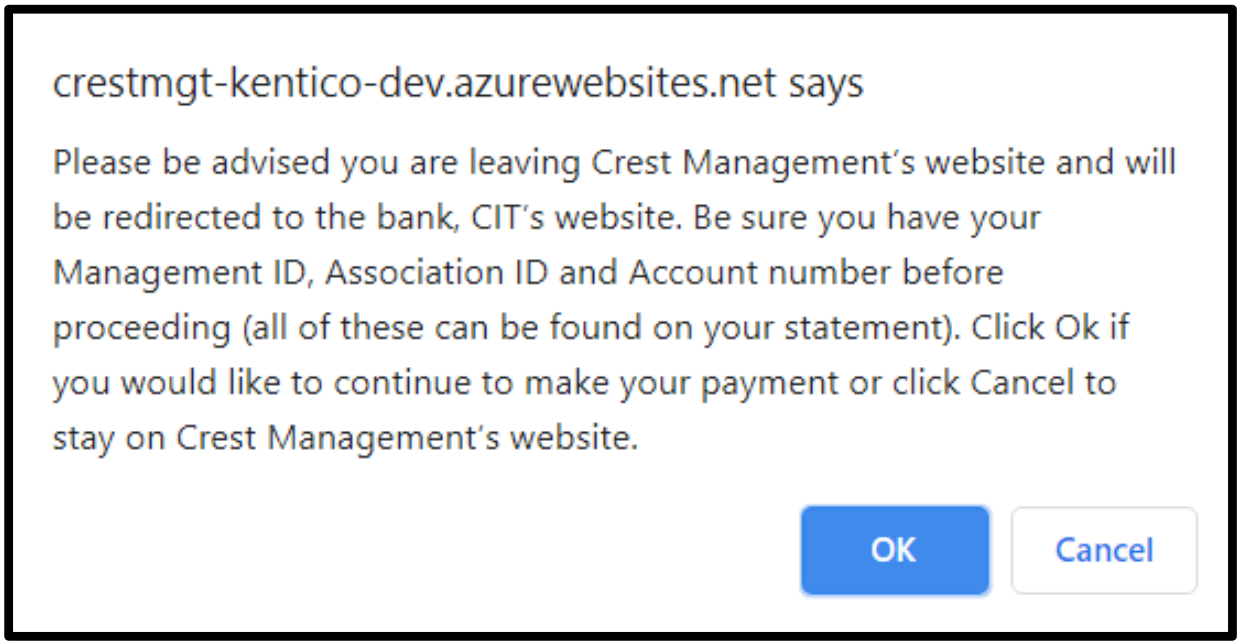
**Payments can take a few days to post and could still be pending and not reflected if made within the past few days. If your account is at the attorney, you will not be ale to download a statement.*



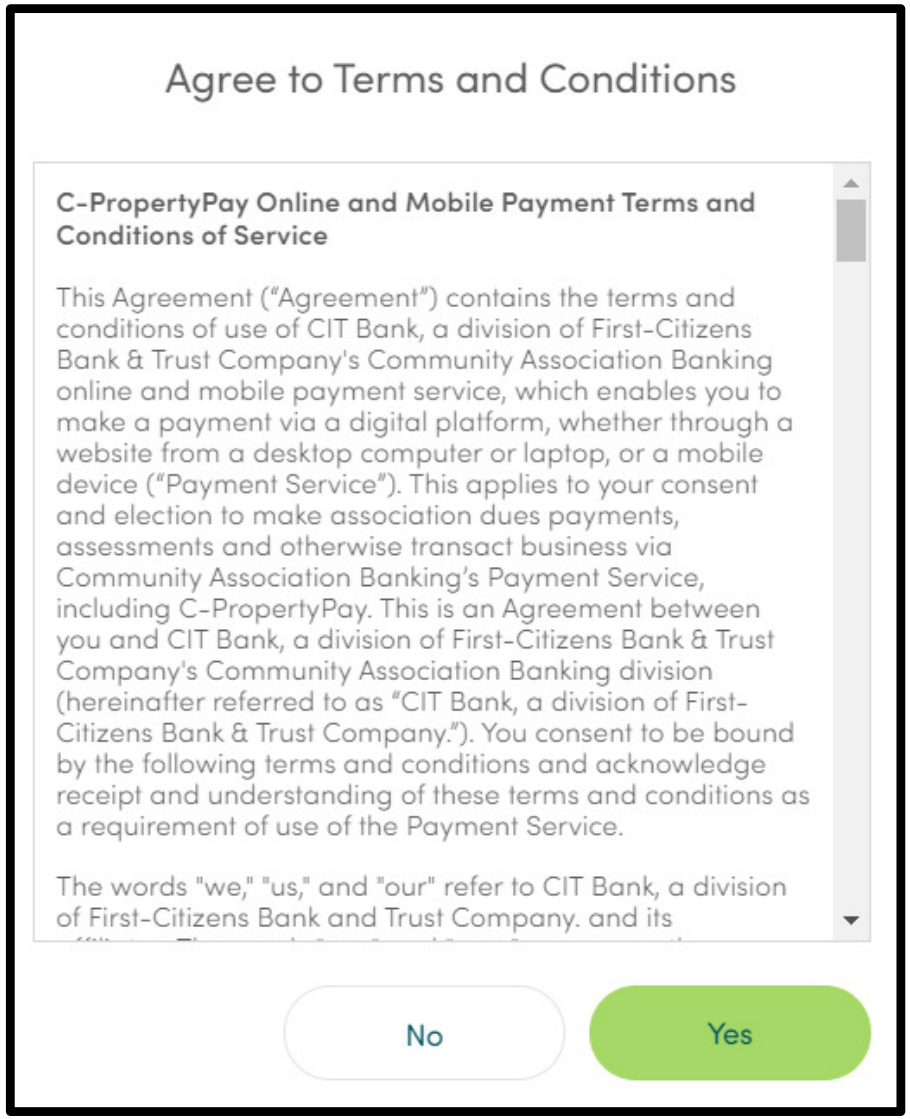
- The Assessment section shows your current balance and account number. Click Pay Now to make a payment.



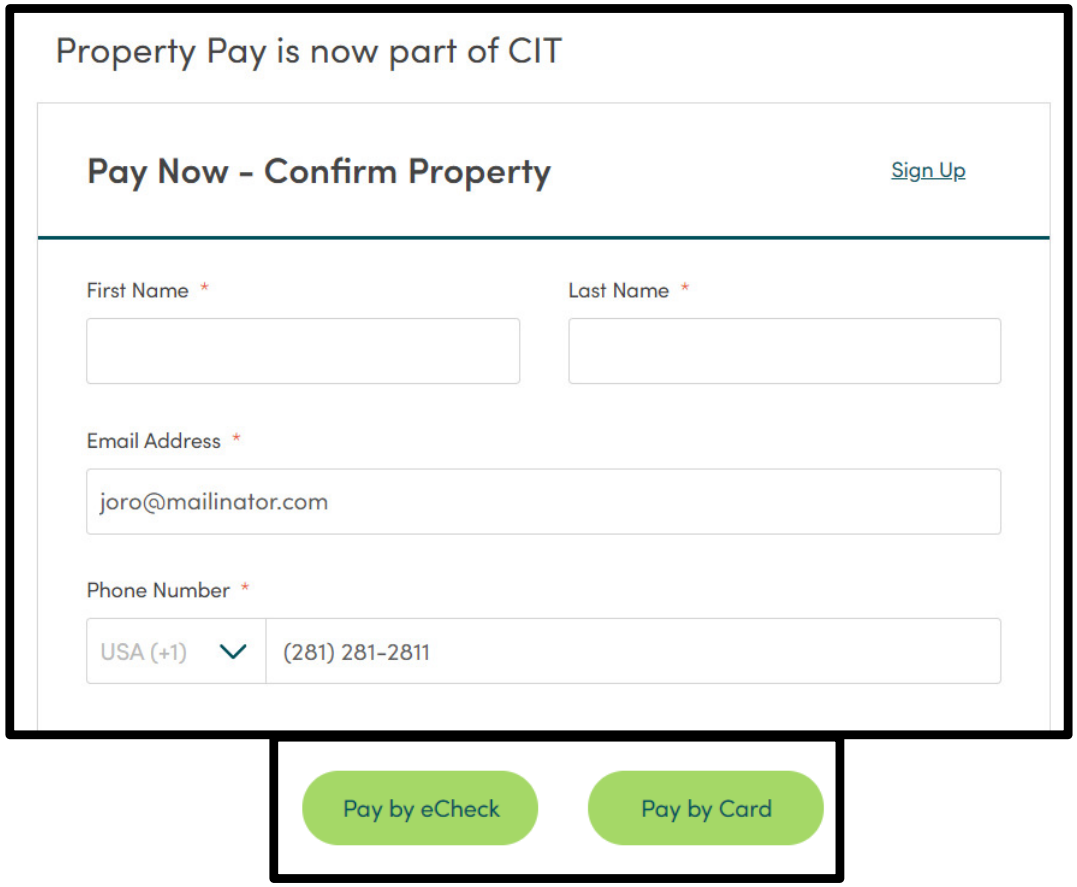
- A pop-up box will appear advising you are leaving the Crest Management website and going to the bank's website. Click Ok.



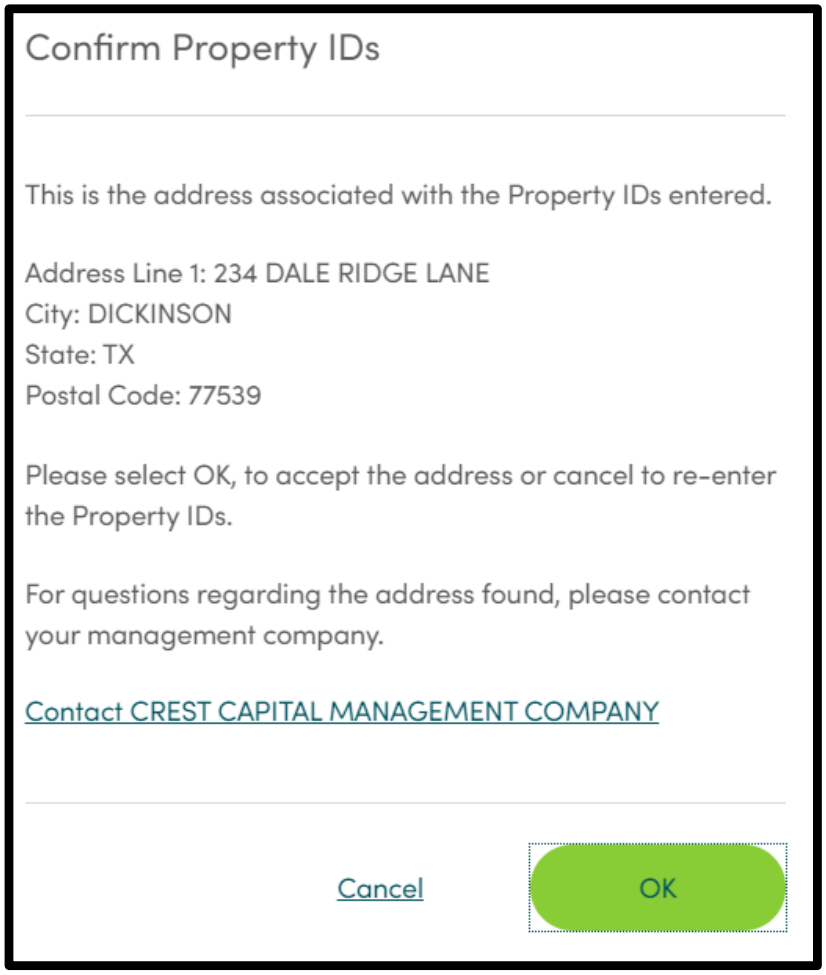
- On the bank's website, the Terms and Conditions will appear first. Review and click Yes to continue.



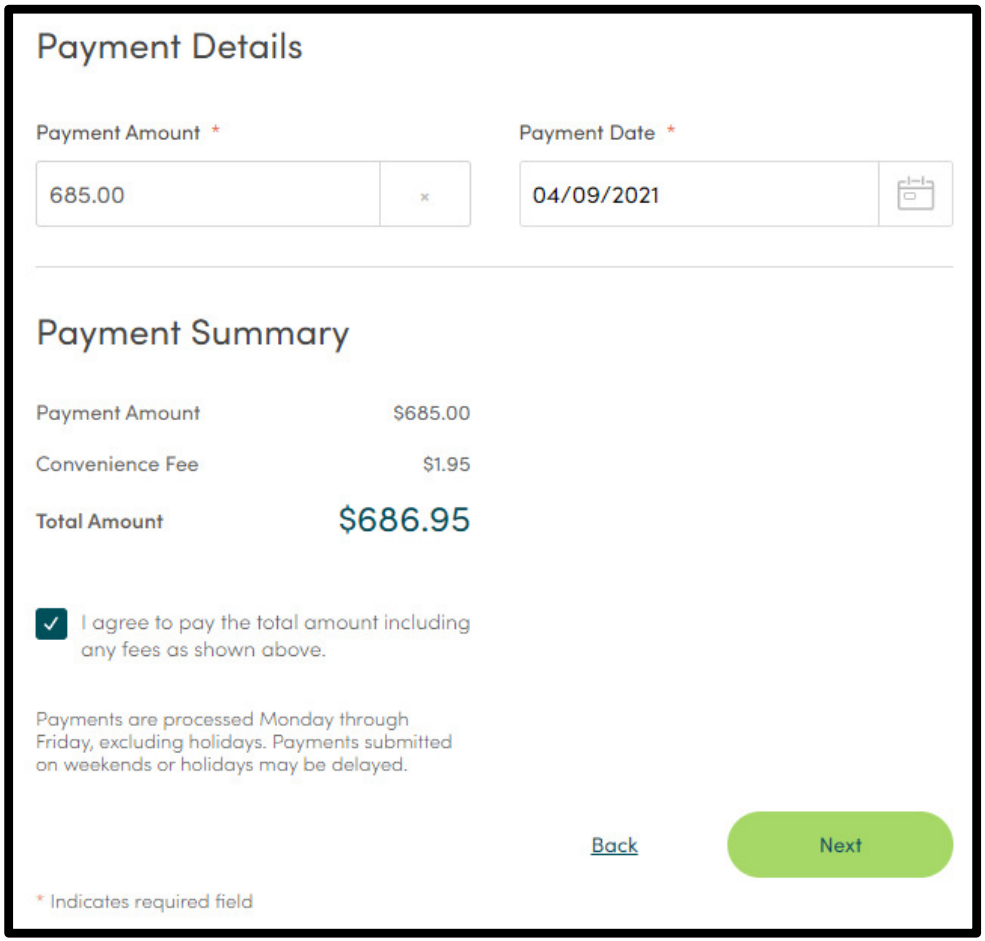
- Enter your first and last name. All other information will already be filled in according to your Crest profile.
- Select Pay by eCheck ($1.95 fee) or Pay by Card (2.95% fee) to continue. **These options only appear once all required fields have been completed.*



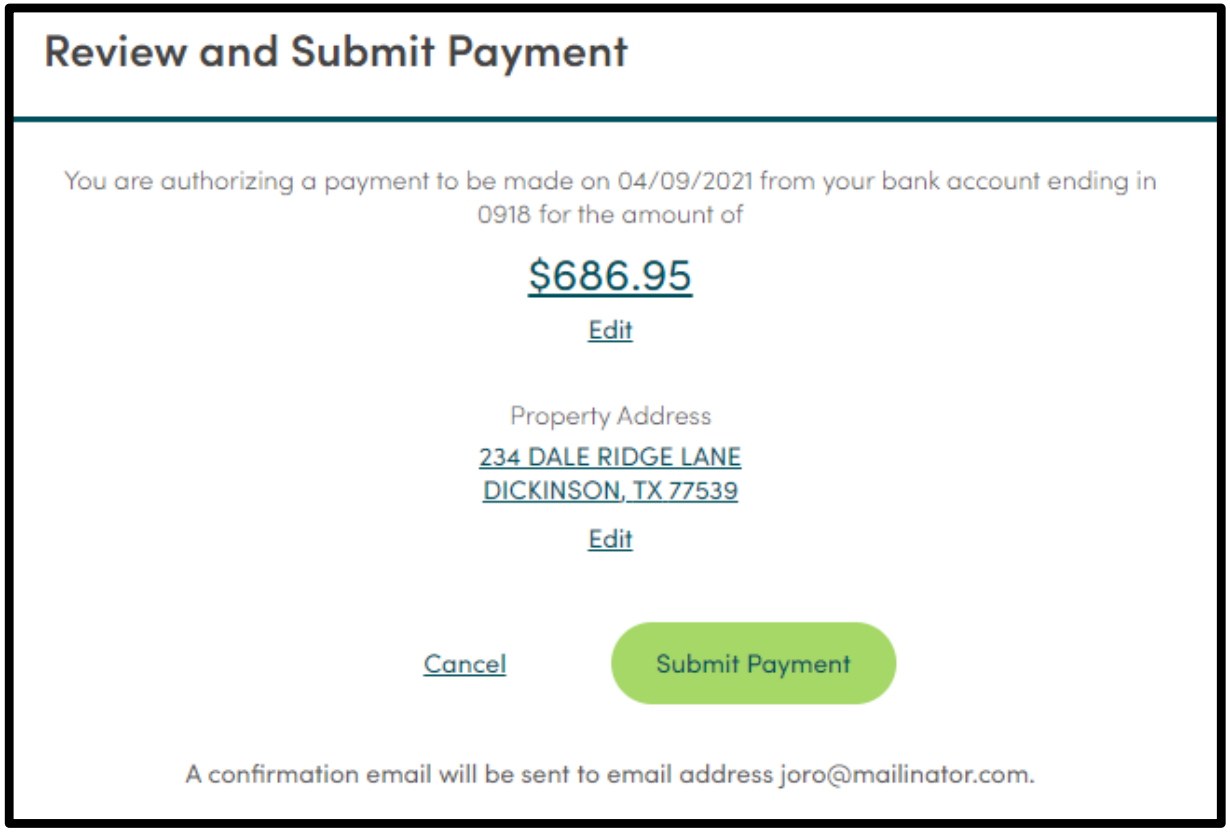
- Confirm your address is listed correctly and click OK to proceed.



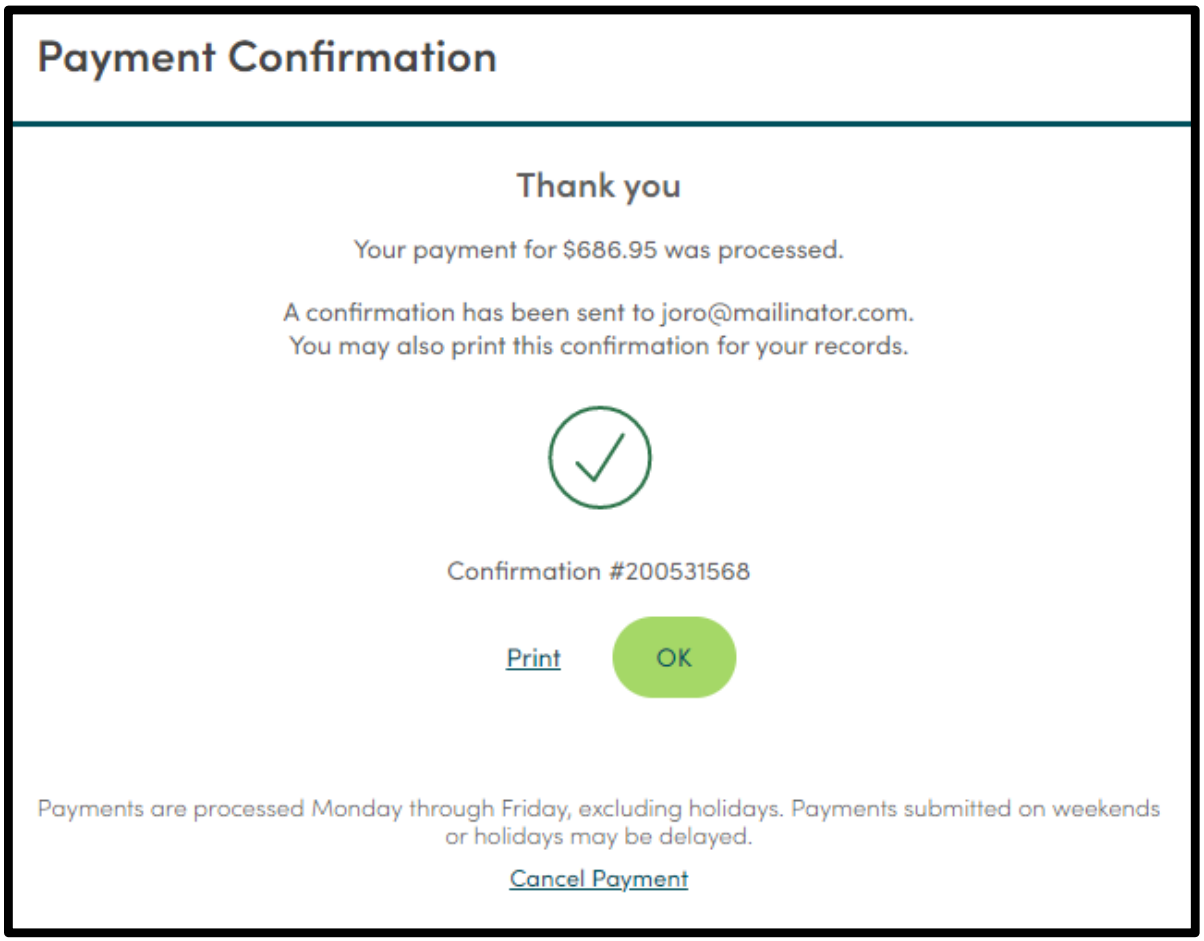
- Enter your eCheck or Card details and type your payment amount. The convenience fee will be calculated.
- Check the box to agree to the payment and click Next. **Next will only appear once all required fields have been completed.*



- Review the payment details and click Submit Payment to proceed or Edit to make changes.

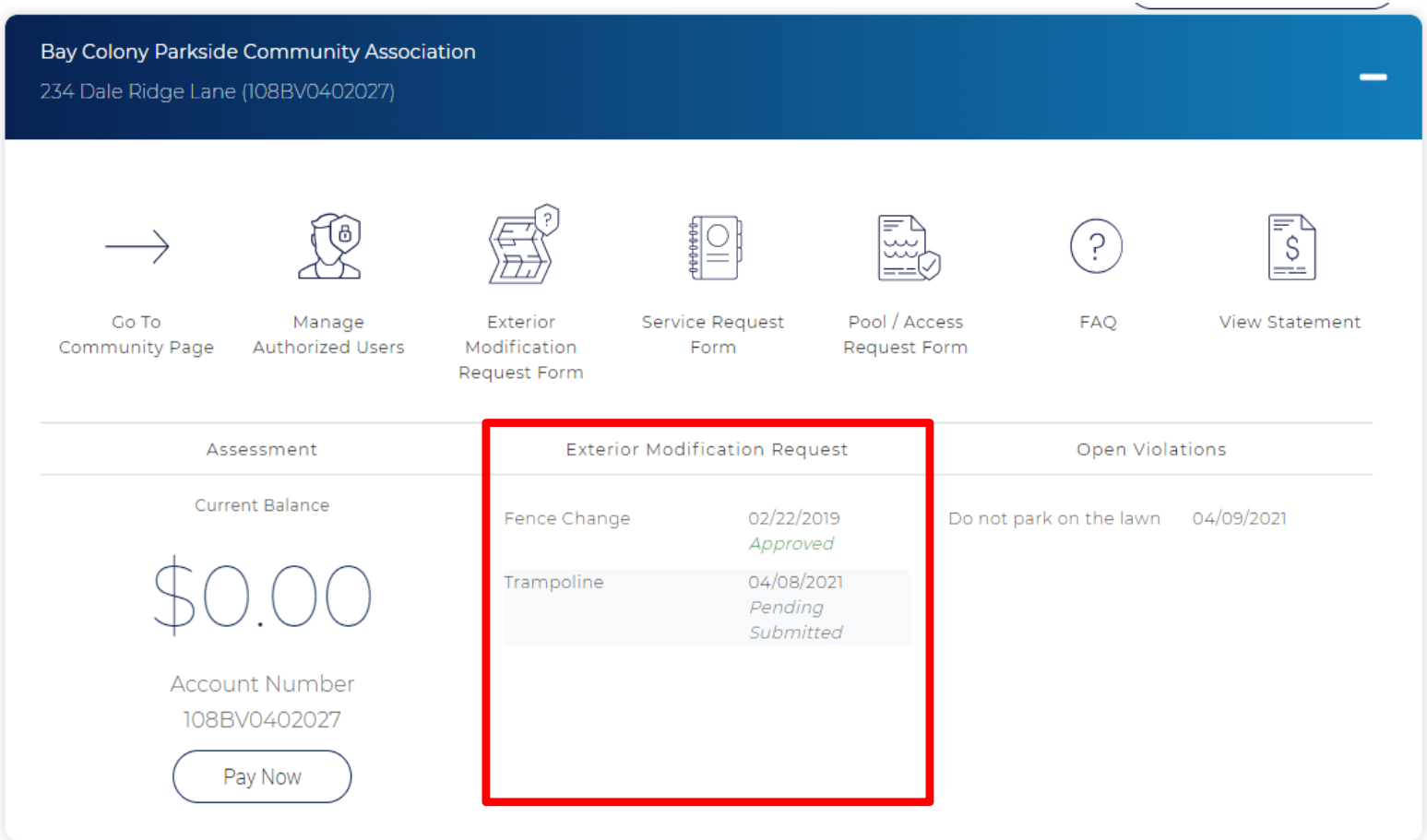


- When the transaction is complete, a confirmation message will appear. You will also receive an email.
- Close the window to return to your Homeowner Dashboard.



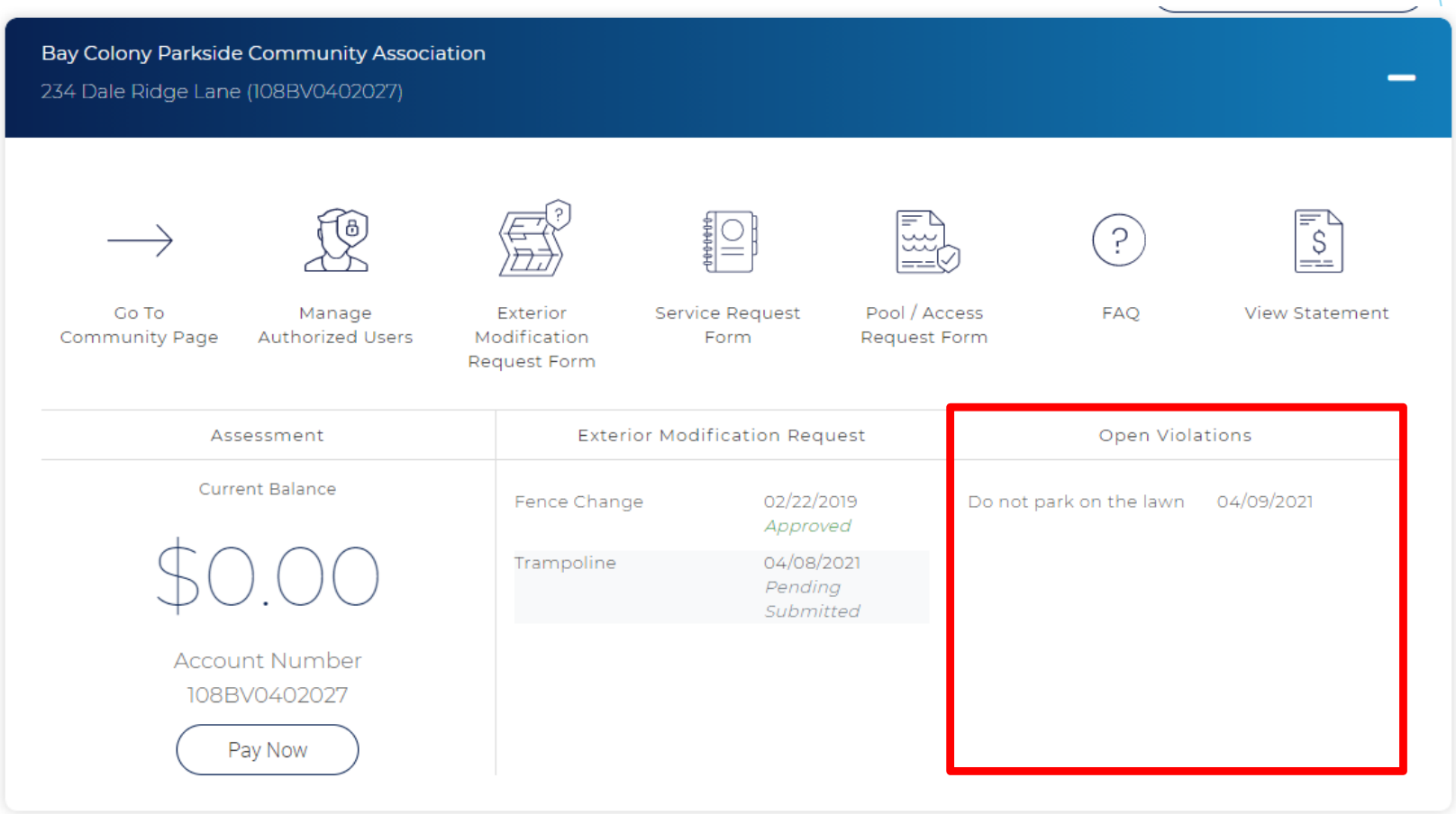
Exterior Modification Request History

- The Exterior Modification Request (EMR) section shows all approved, denied, and pending EMRs for your property. This is snapshot data, it is not clickable.

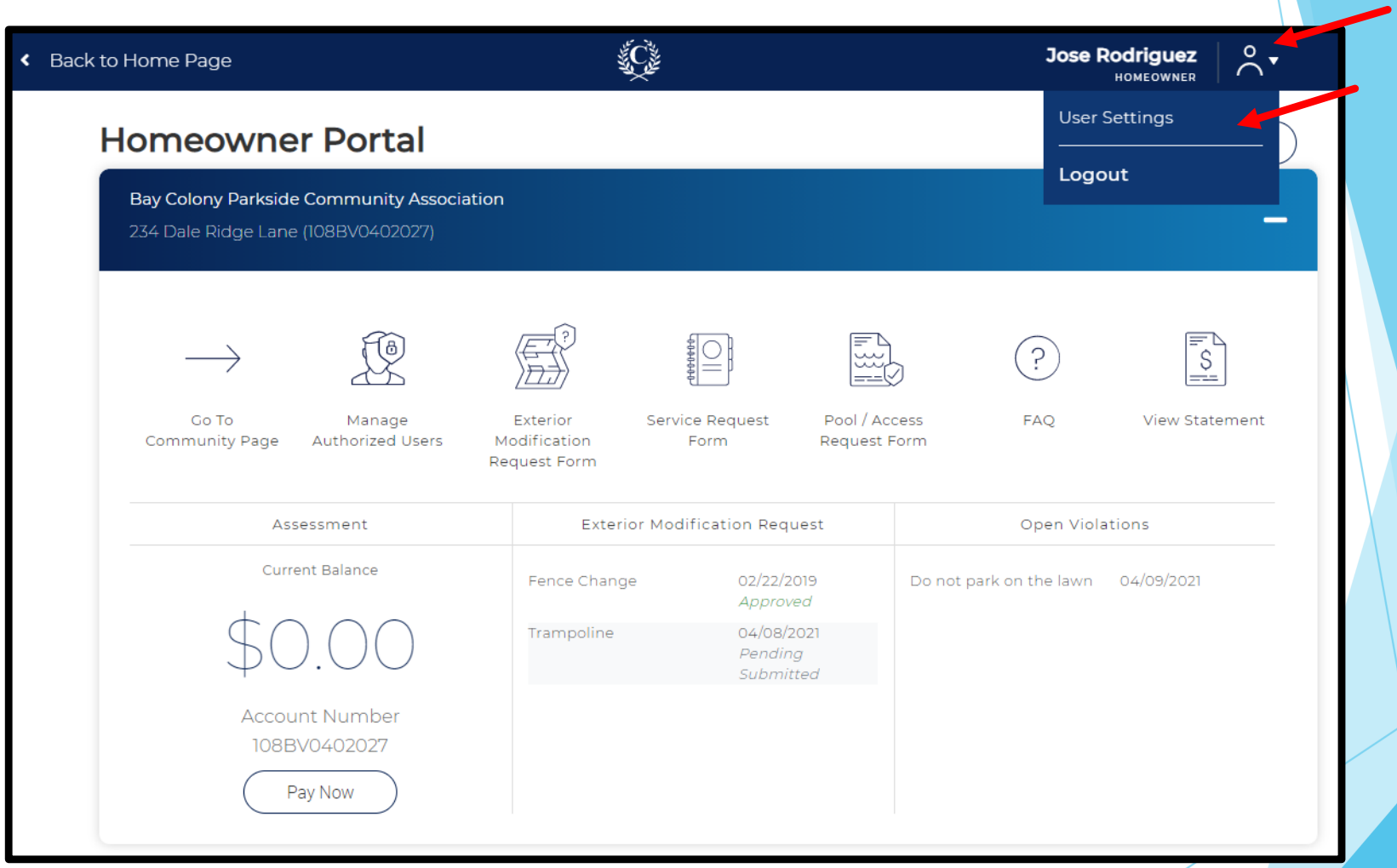


Open Violations

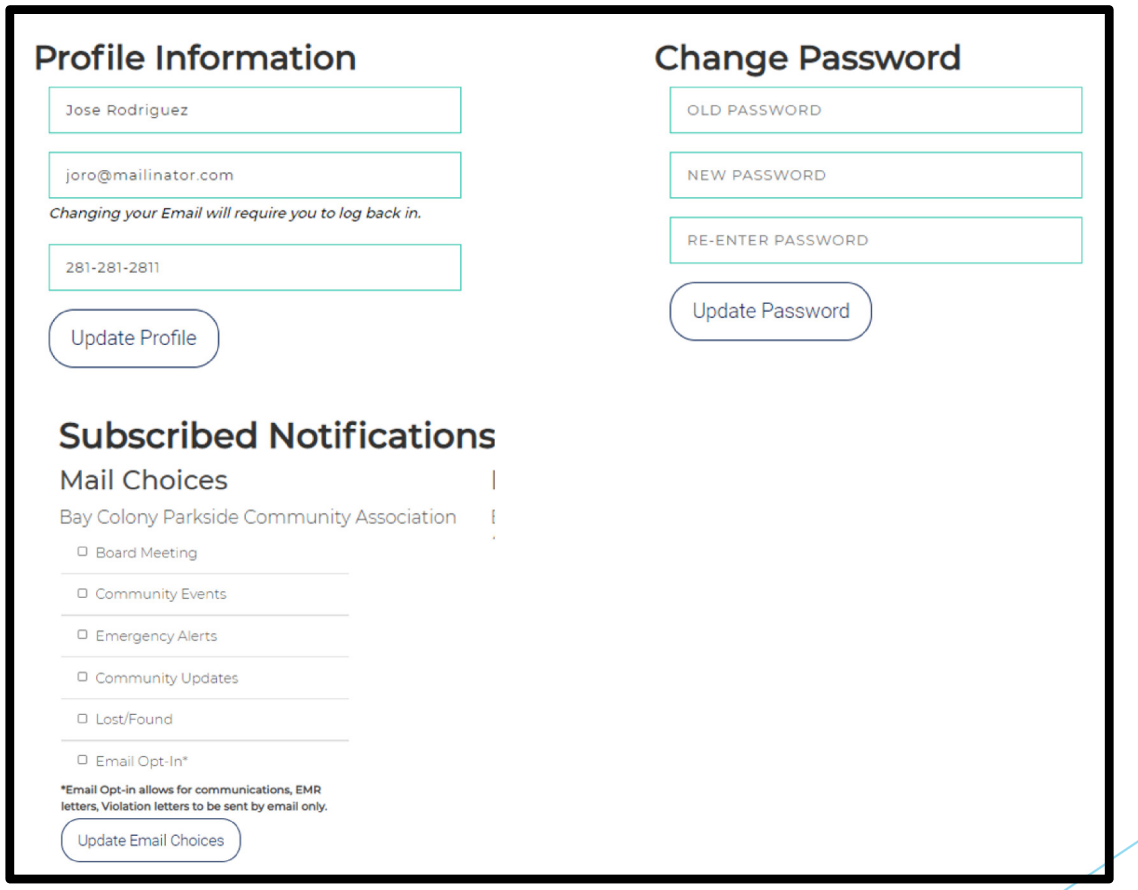
- The Open Violations section will show deed restriction violations currently noted on the property. This does not depict historical data and is not clickable.



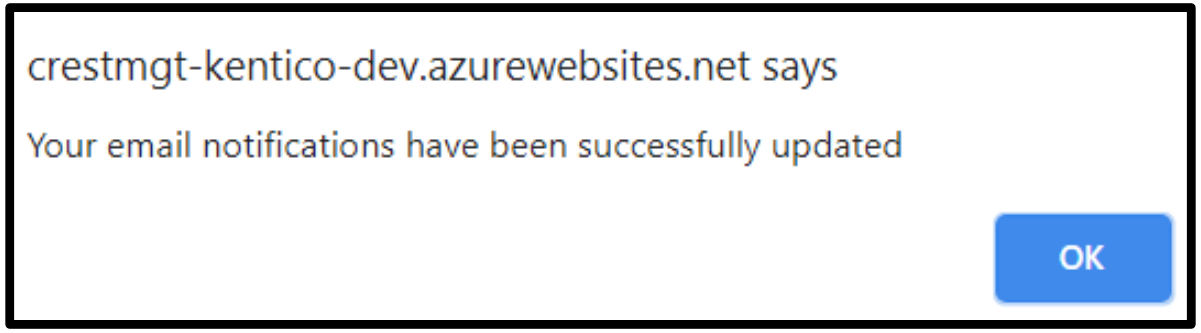
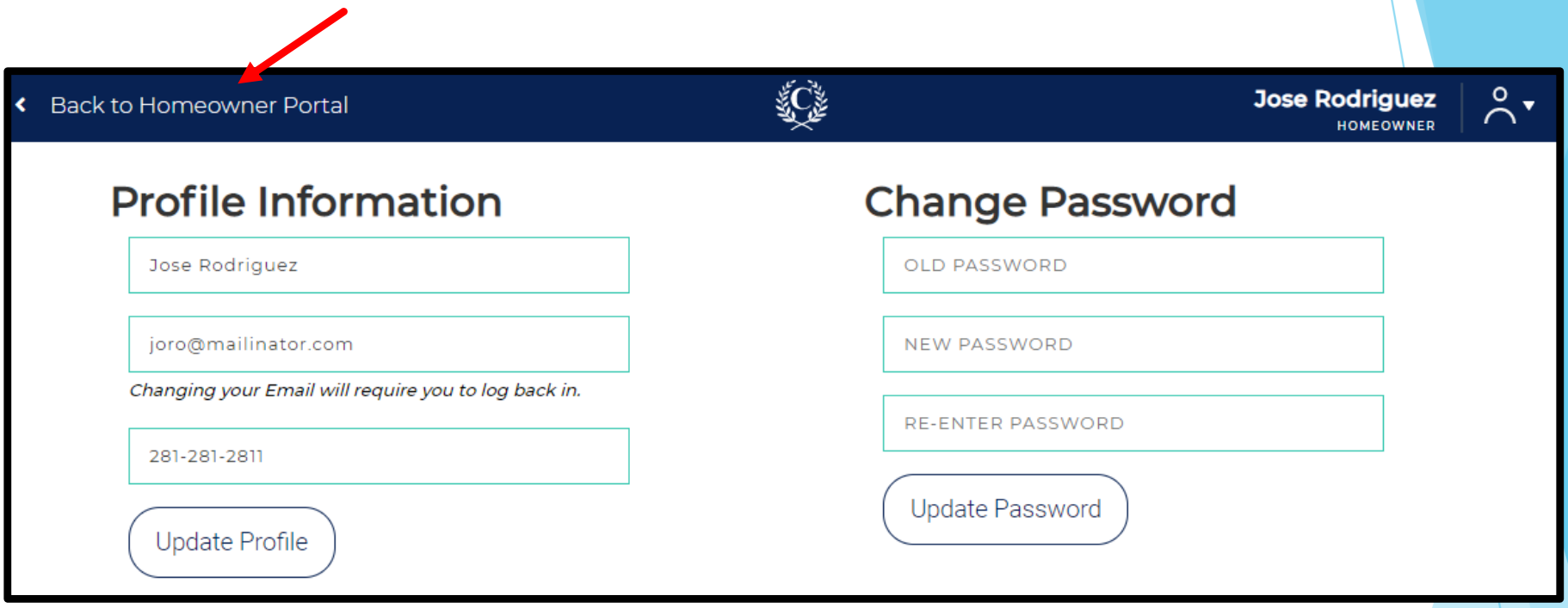
- Click the person icon by your name then select User Settings.



- Update your profile, password, and notification selections as desired. Be sure to click the corresponding Update button below each section updated to save the changes.
- Subscribed Notifications refers to email notifications. **The available category options varies by community.*



- A confirmation box will appear each time information is updated. Click OK to continue.



- Click Back to Homeowner Portal to return to your Homeowner Dashboard.