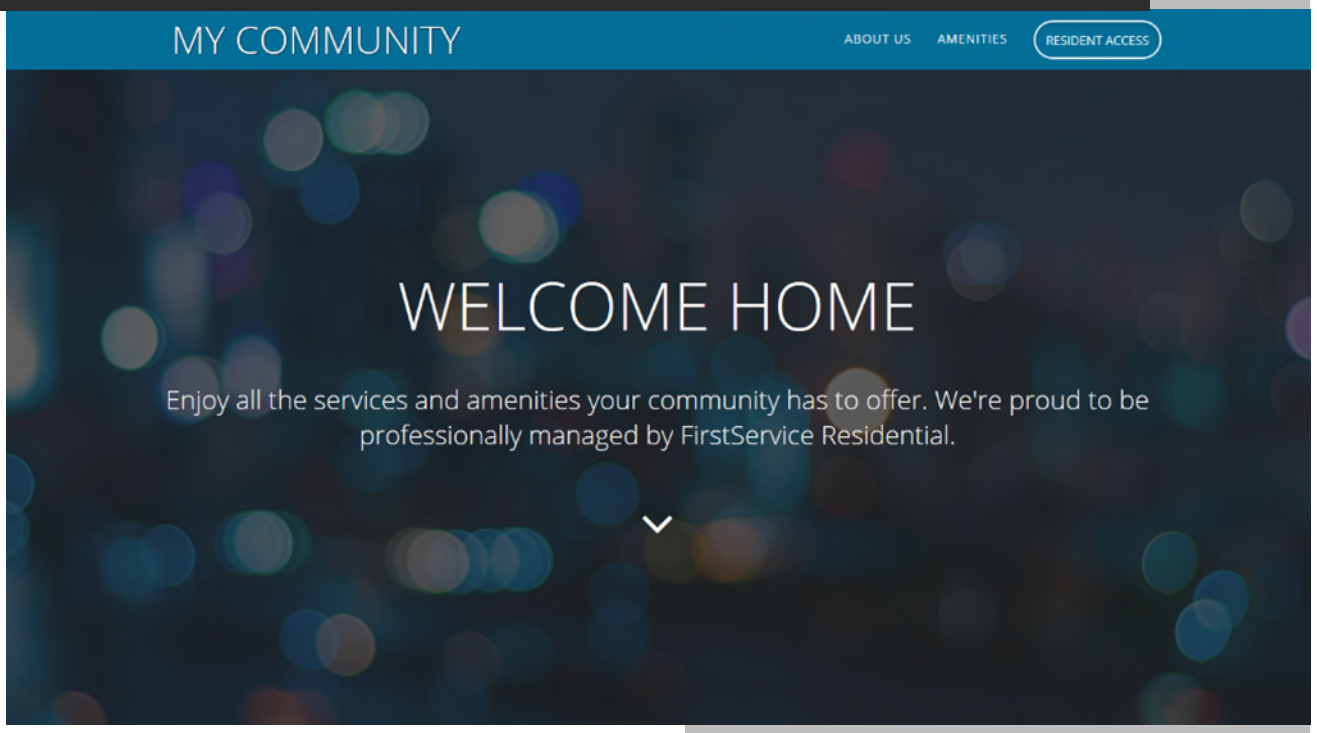
Resident
User Guide

Connect Community Website



FirstService Residential

Updated: November 2021

RESIDENT USER GUIDE

[insert your community website URL here]

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HIGHLIGHTS

The Connect Resident Portal (a.k.a. – Community Website) is available to all FirstService managed communities. This document will provide you with information on the various functions of the site:

Your Personal Homeowner Account: A self-service platform lets you communicate with your management team, submit service requests, check account balance information, opt-in for electronic delivery, download forms and documents, update your mailing address, obtain package information and much more.

Events and Happenings: Never miss a thing by utilizing the community calendar feature and posted community news to stay in-the-know on happenings within your community.

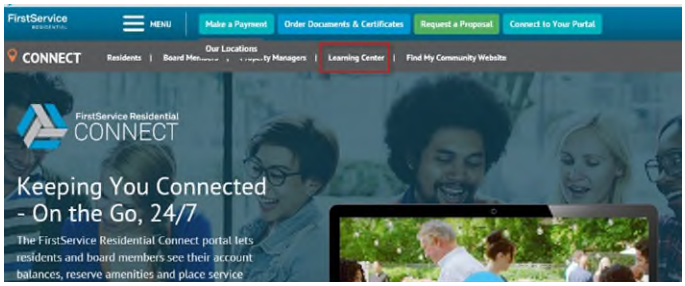
Neighbors: An optional resident directory enables easier interactions with fellow residents. Of course, homeowner privacy is a top priority, so this feature is activated only for those who choose to opt-in.

Information: Have a quick question? No problem. Visit the FAQ/Help section of your community website to get answers to some of your most common association questions.

Devices: We know that being connected anytime, from anywhere and from any platform is essential for homeowners. To that end, your website's updated and responsive layout is designed to support desktop, tablet and mobile displays and is also available as an app.

Peace of Mind: Get the highest level of protection with up-to-date security and strict privacy settings.

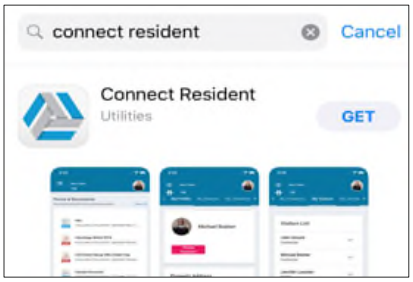
Check out
http://fsresidential.com/connect **to learn more about Connect & see the "Learning Center" tab on the page for videos on how to navigate the site.**



MOBILE APP

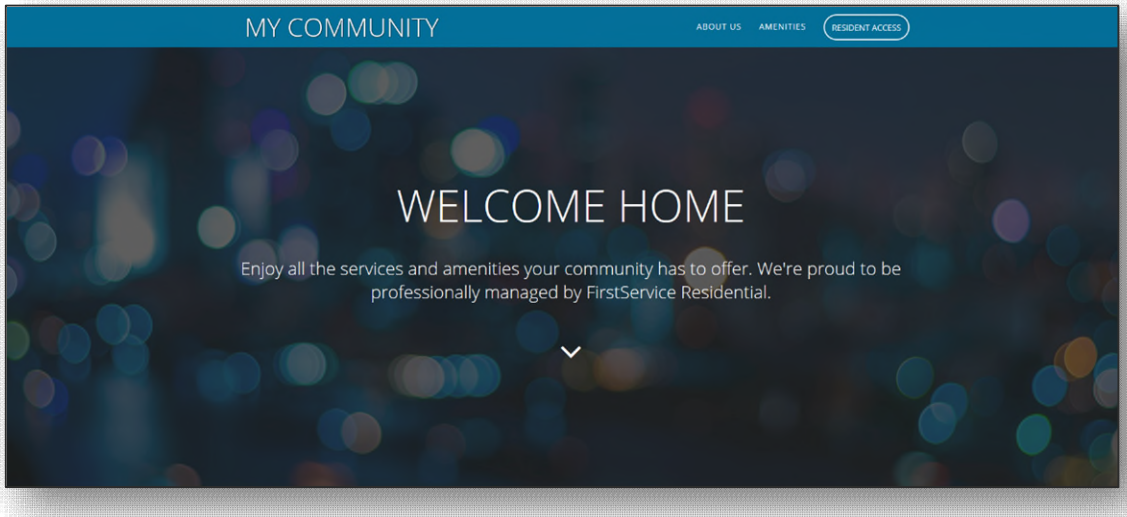
Download the app version of the site! Access your smart phone's App Store and search "Connect Resident" to download the app. The login for the app is the same as the login you set up when you registered for the site.

The mobile app reflects the same categories and information on the URL version of the site.



LANDING PAGE

The landing page contains information specific to your community and is where you will register and login to the site.

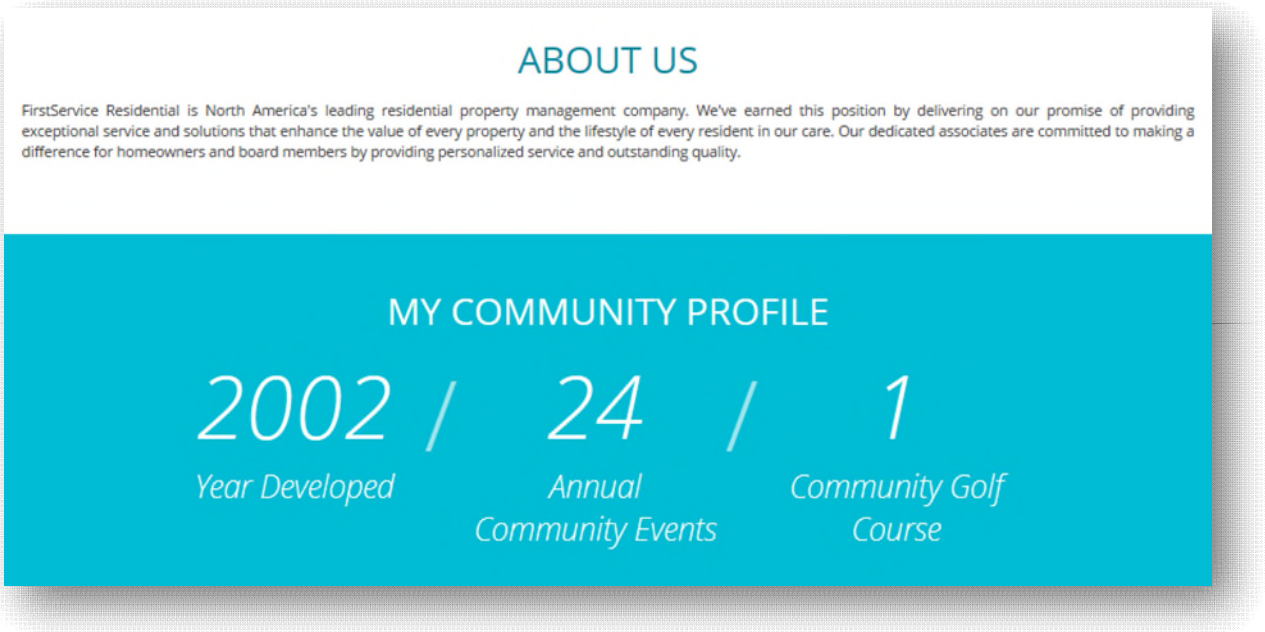


About Us

The story of your community!

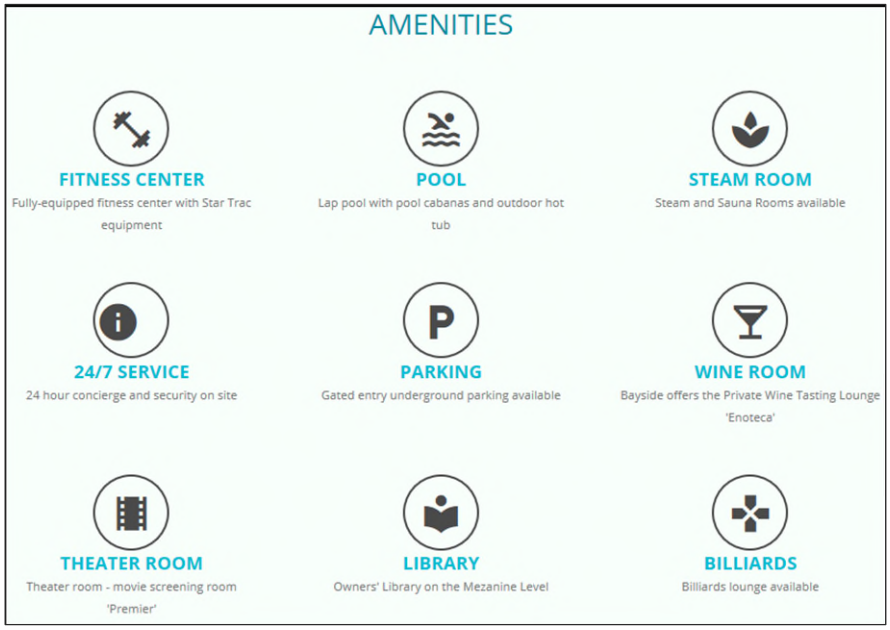
Property Profile

Provides quick stats/information about the community.



Amenities

Highlights the great features of your community!



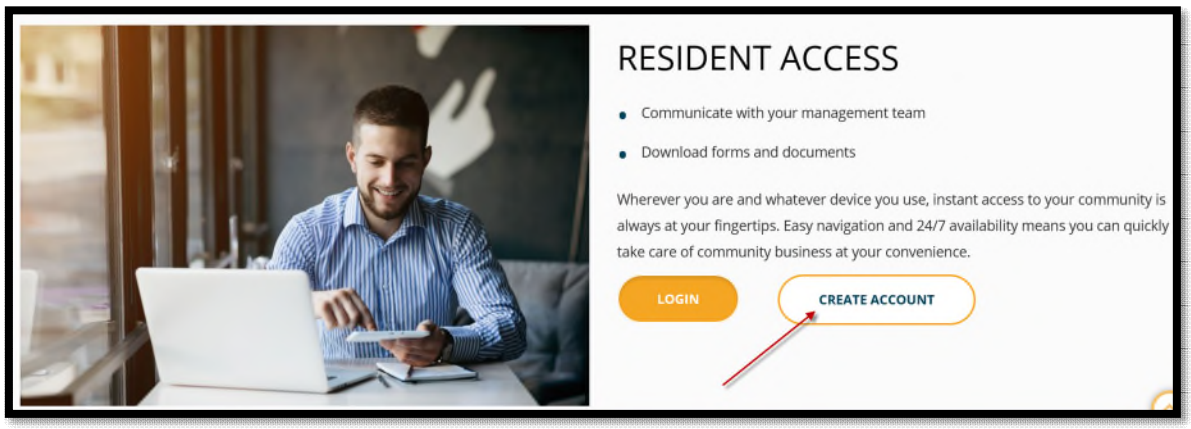
Resident Access - Registration

To log into the site, residents must register.

1) Complete registration by clicking **CREATE ACCOUNT** on the landing page of the webpage or “Create Account” via the app.
2) Once the required account info is entered, a verification code will be sent; this 2-factor authentication method ensures the highest levels in security.
3) Once in the site, to complete registration, either the Property Address or Account Number (listed as “Customer ID” on the Assessment Statement) are required.

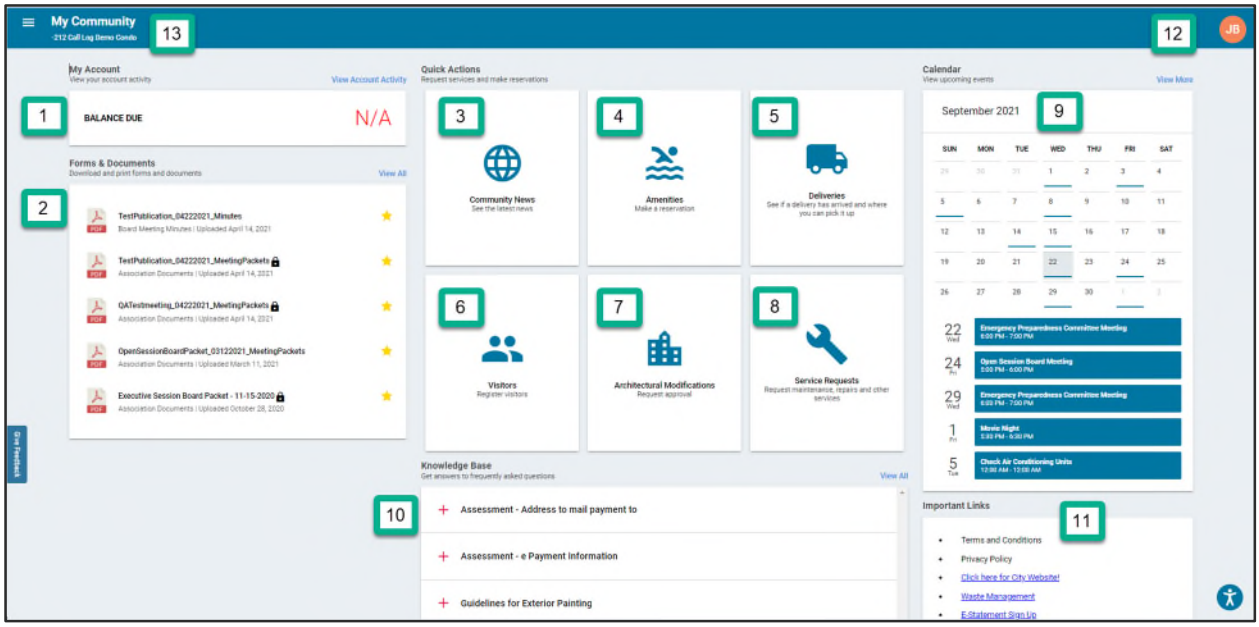
   Need Assistance?

   Contact the Customer Care Center for fast, live support 24/7 at **1-800-428-5588.**



DASHBOARD/HOME PAGE

The Resident Portal Dashboard is a summary of the various parts of the Portal; click on any section of the homepage to view the full section:



***INDICATES THAT THIS FEATURE LISTED BELOW MAY NOT BE APPLICABLE/VISIBLE TO YOUR COMMUNITY.**

1) **My Balance**

   Owners can view current account balance total as well as the last six months of transactional account history. The Make Payment link directs the owners to ClickPay – our online service for setting up auto-pay or making a payment via credit/debit card. Please note that once a one-time registration with ClickPay is completed, single sign on (SSO) access to ClickPay from the Connect Resident Portal will take place.

2) **Forms & Documents**

   This section displays the most recently uploaded documents to the community. Clicking **View All** will allow you to sort by different types of documents (Governing documents, Forms, Newsletters, etc.) and you can also search by title of the document.

3) **Community News**

   Posts from the management team for events and community information

4) **Amenities***

   Facilities or a useful feature/service offered to residents

5) **Deliveries***

   Check to see package delivery information: Package history and pickup status.

6) **Visitors***

Enter a guest or visitor to your account.

7) **Architectural Modifications***

View the status of a submitted Architectural request under your profile. This feature may not be applicable for the association if the Quick Action is not available on your dashboard

8) **Service Requests**

Report a maintenance or service need within the community. The Community Manager will be notified and act. **Status updates:** Return to this section to view updates on the submitted request.

9) **Calendar**

The Community Calendar will list upcoming events like board meetings and social events.

10) **Knowledge Base**

What is the monthly assessment amount? What are the guest parking rules? These are all questions that residents can find the answer to within the Knowledge Base and are based on the community's rules and regulations.

The most frequently asked questions will display on the dashboard, but residents can browse through 200+ questions and answers by clicking View All.

11) **Important Links**

Useful links or resources

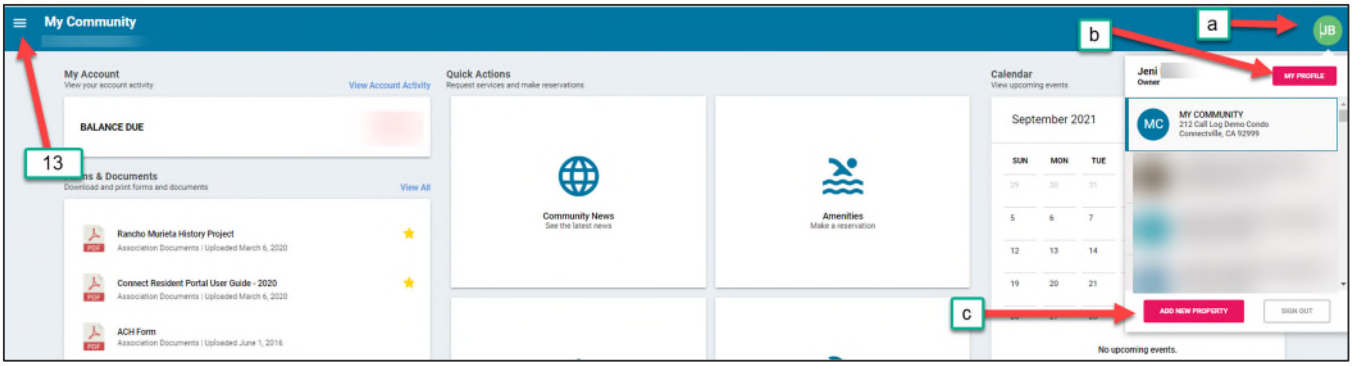
12) **My Profile and Properties**

Clicking on your initials in the top right corner will display the list of properties tied to you! This means you only need to register once, and you can view account and community details for every home/unit you own that is managed by FirstService – switch between them at the click of a button.

- Please just ensure the same email address and cell phone number is on file for all the units you own so they will all display; just click "Add New Property" in this section listing your units, for any new units to refresh and display in your profile.

This is also another way to access your Profile (aside from the My Account section) to update your password, link another property you own, and change other personal information.

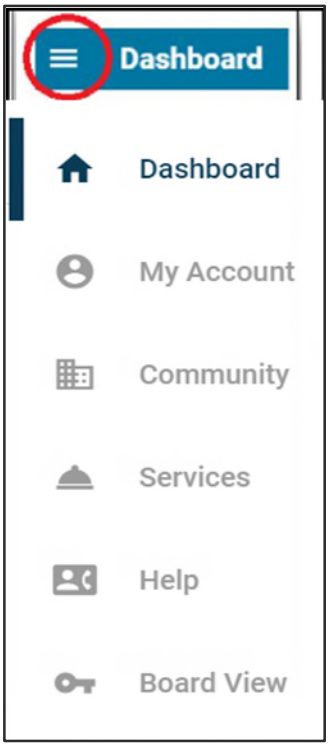
a) Select Initial
b) Select My Profile
c) Add New Property



13) **Menu (In the upper left-hand corner)**

The menu allows you to navigate to the full sections displayed on the Dashboard:

- **Dashboard:** The main page
- **My Account:** Your personal account information
- **Community:** Association information
- **Services:** Submit Service Requests and check any package delivery history for your unit here (if applicable)
- **Help:** The full Knowledge Base and Contact the Manager section
- **Board View:** A Board Member-Only section



MY ACCOUNT SECTION

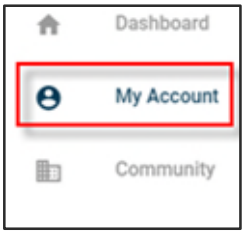
1) **My Profile**

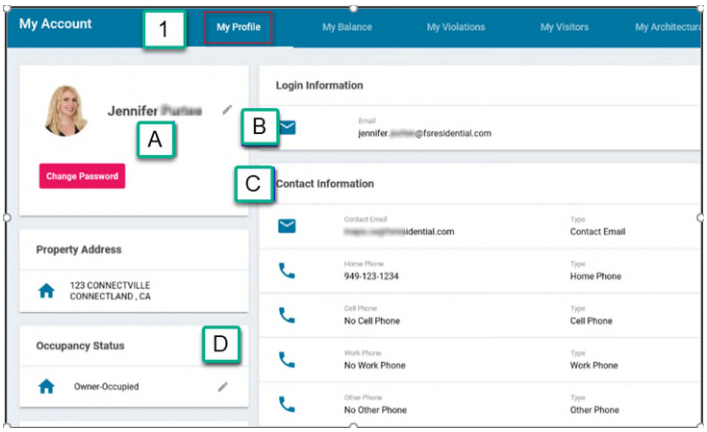
A. **Profile Display:** Access this section to update your profile picture, display name (for the Resident Portal only) and password

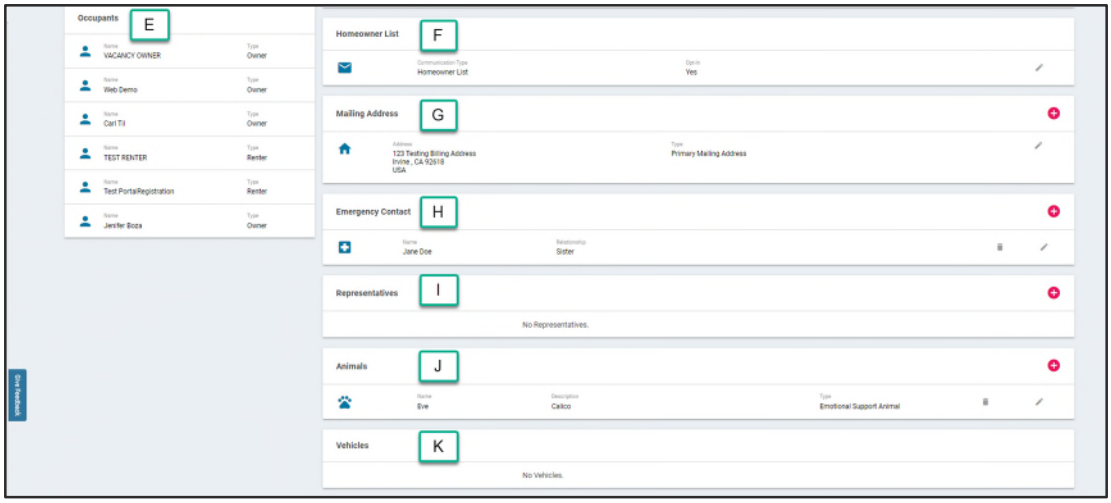
B. **Login Information:** Update email addresses to log into the Resident Portal

C. **Contact Information**: Review and update phone number(s) and email addresses here.

D. **Occupancy Status:** Owner can designate whether the unit is occupied by the owner or tenant







E. **Occupants:** View the occupant listing for the unit (owners based on who is listed on the title; update applicable tenant information with the management team)

F. **Homeowner list:** Owners can “opt-out” of being included on any requested Membership List by accessing the Community Website → My Account → My Profile. By opting out of the Membership List, your name(s), property address, mailing address(es), and email address(es) will not be included in the Membership List provided to owners upon request for purposes related to association business as allowed by California Civil Code. Even if only one owner of the property opts out of the Membership List, then the property will not be included in any Membership List requests.

G. **Mailing Address:** Owners can update their billing address and add an optional secondary address

   i. To update your Billing Address, select Primary Address from the dropdown

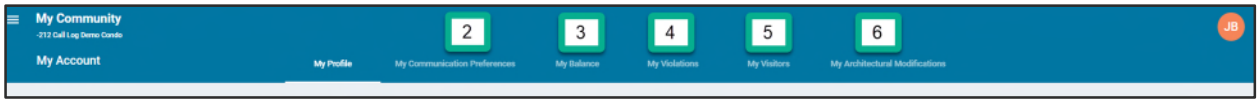
H. **Emergency Contacts:** Emergency contacts can be added from the website to FirstService's database

I. **Representatives:** Owner can add in Property managers, legal representatives, etc. associated with the unit

J. **Vehicles***

K. **Animals***

***** Note that this fields may not display if not applicable to be tracked for the community.



2) **My Communication Preferences**

   Select how you would receive communication

3) **My Balance**

   Provides a quick glimpse into the charges and assessments of your account

4) **My Violations**

   View real-time status and historical compliance concerns including PDF copies of the letters sent via U.S. Mail

5) **My Visitors**

   If applicable to your community, residents can view or modify the roster of visitors attached to their unit

6) **My Architectural Modifications**

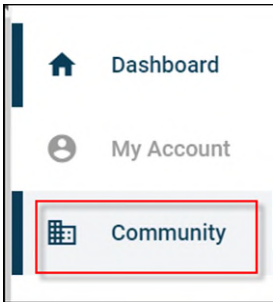
   Owners can view the status of their Architectural modification request

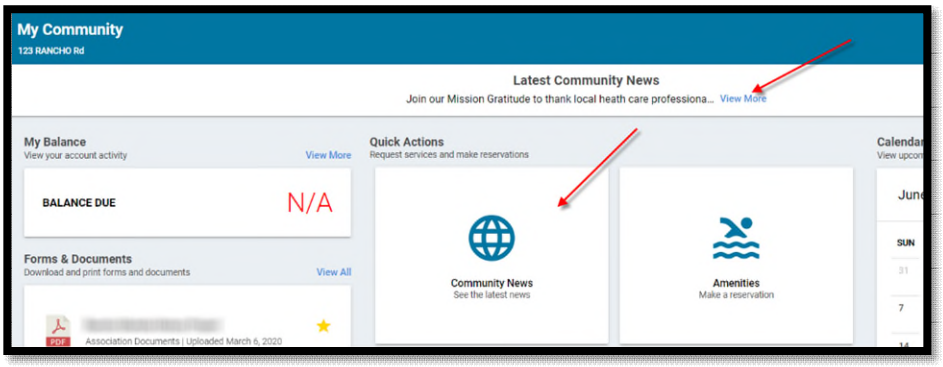
COMMUNITY

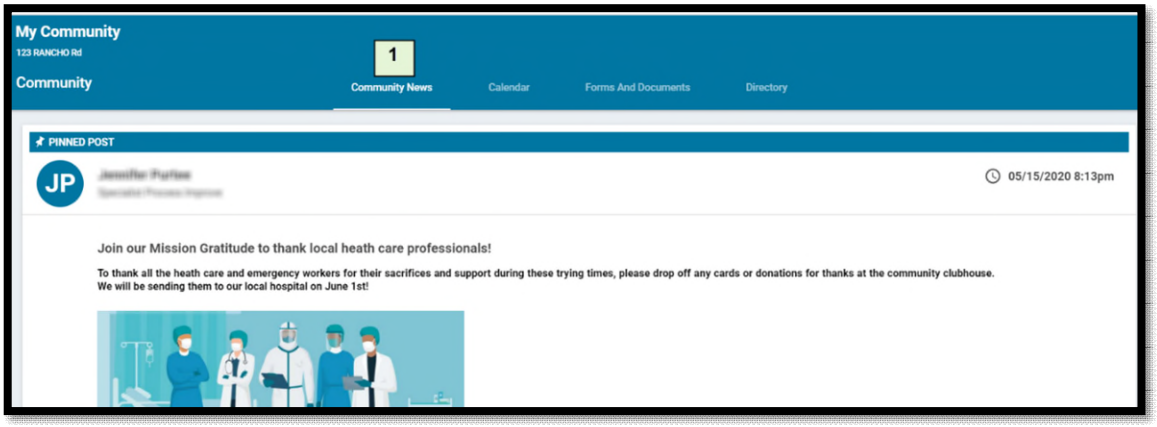
1) **Community News**

Stay tuned for posts from the management team for events and community information!

- Click “View More” in the banner view, click the Community News widget from the homepage
- Or, access the news via the Community tab → Community News

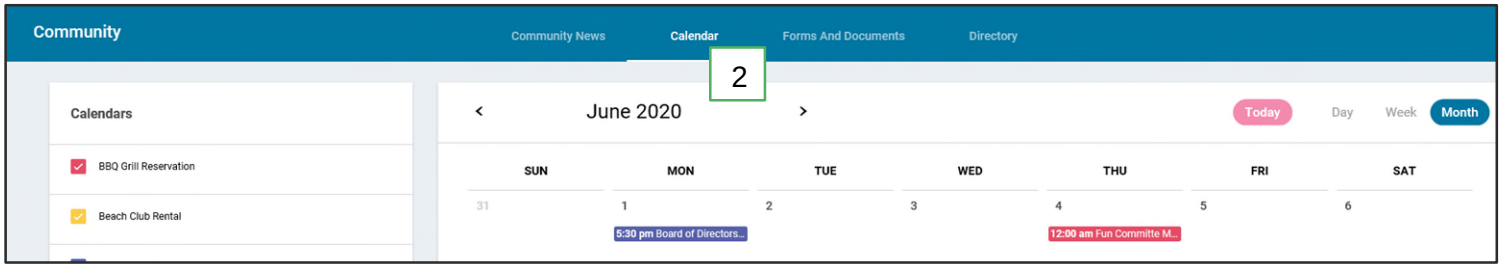






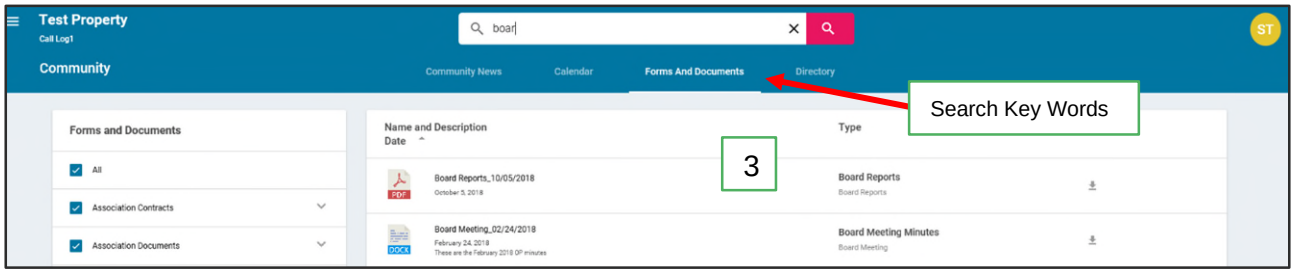
2) **Calendar**

Stay up to date on what events are going on in the community with the Community Calendar!



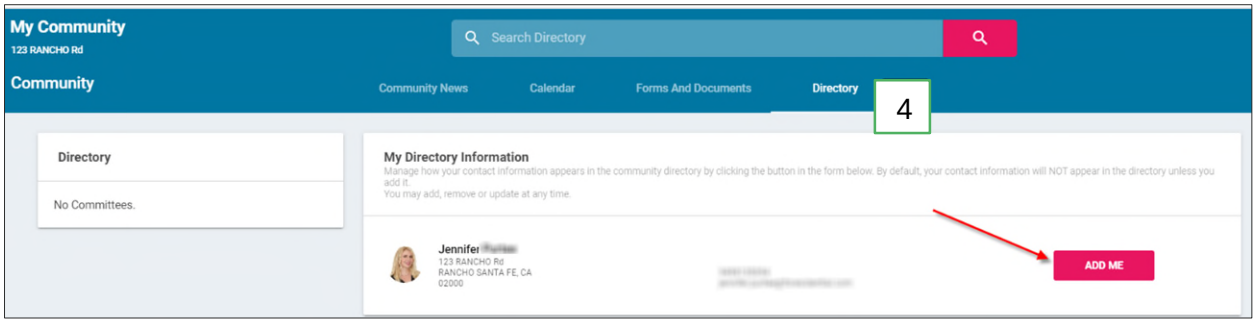
3) **Forms and Documents**

Important forms, documents, and meeting minutes - Search by key word/title!



4) **Directory (Optional to Join)**

A personal “phone-book” for the community. Residents can choose to display their contact info in the directory by clicking “Add Me”. They can also choose what contact info appears (e.g. email but not phone number)

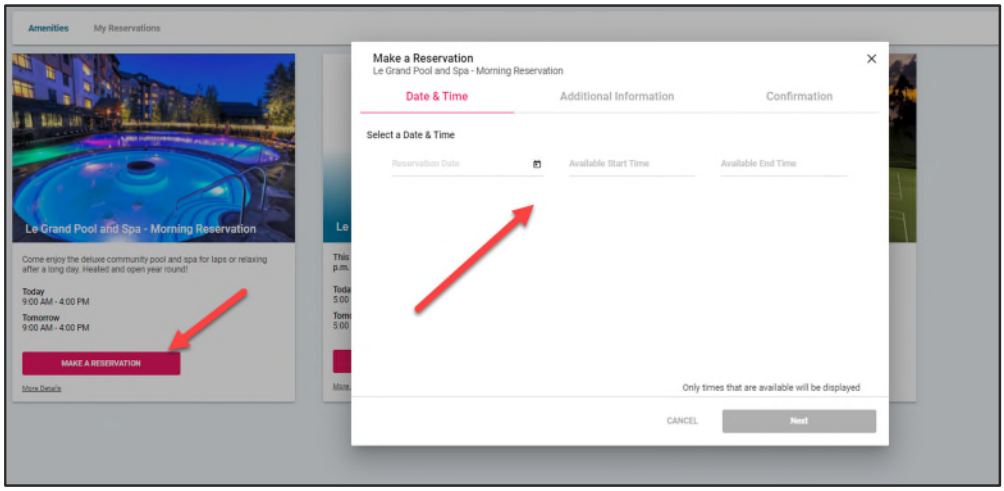


SERVICES

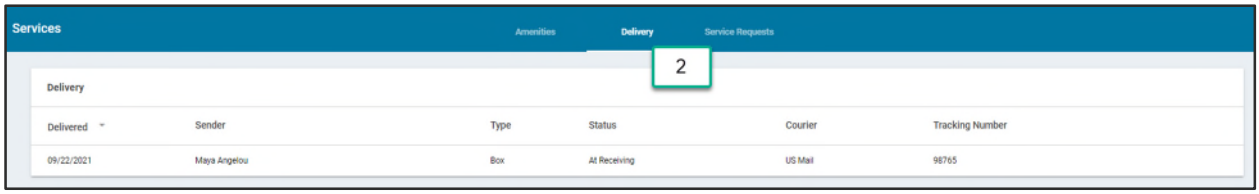
The Services section of the Connect site feature any packages awaiting pickup for you and host any Service Requests you have submitted for management to review and handle (if applicable for your community).

1) **Amenities (if applicable)**

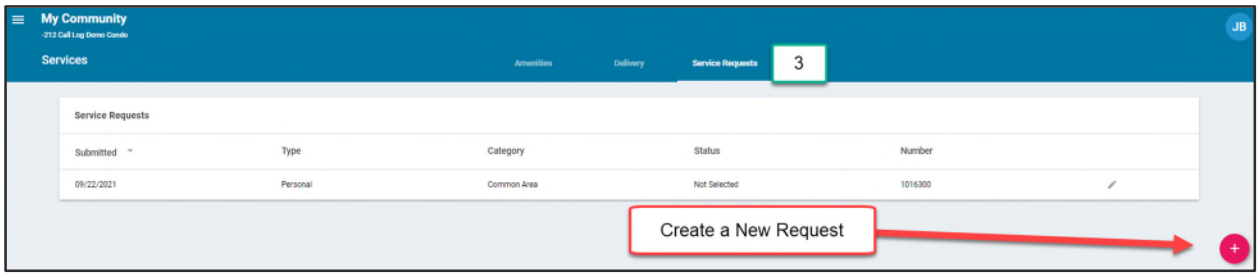
A. **Amenities**: Residents would go to this tab to make a reservation
B. **My Reservations**: View your current reservation status



2) **Deliveries (if applicable)**
You will receive an email and phone call notification of any packages awaiting your pickup, and you can also see any pending packages under the Services → Delivery section

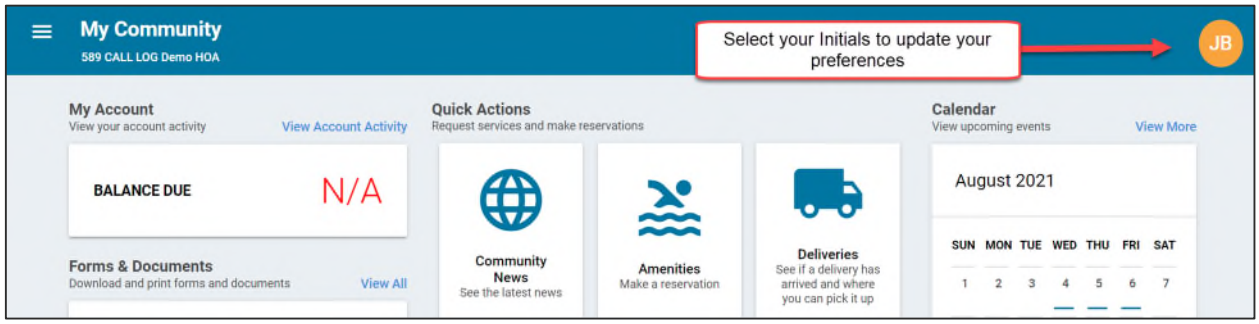


3) **Service Requests (if applicable)**
Any issue you have reported for handling by the management team can be seen under the Service Requests section (where you can also add a Service Request via the "+" sign in the bottom right-hand corner).

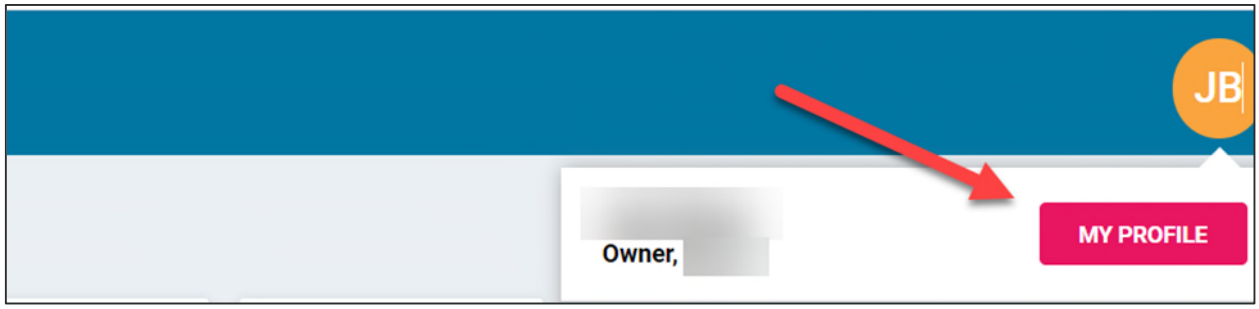


UPDATING COMMUNICATION PREFERENCES

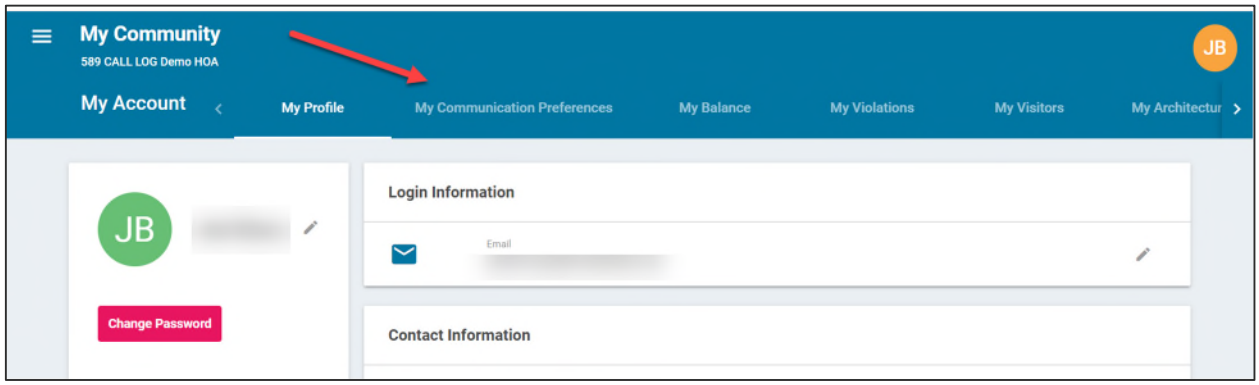
1) Select your Initials on the top right corner of your Homepage / Dashboard



2) Select Profile



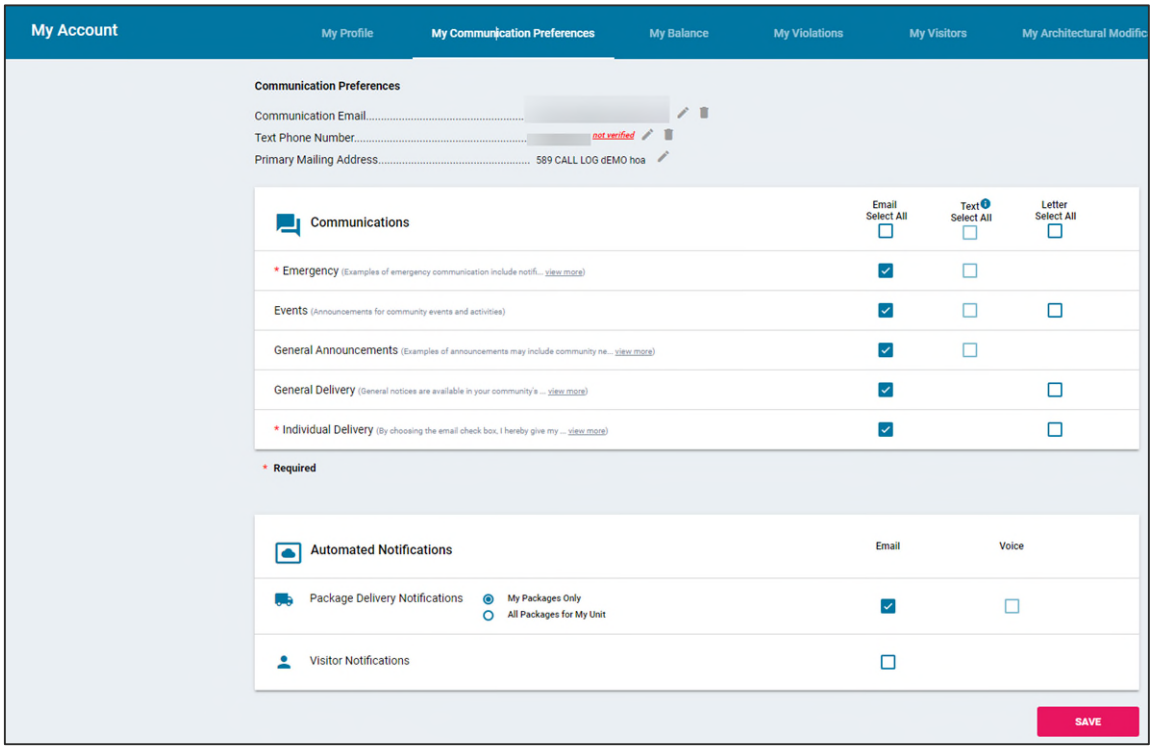
3) Once directed to the next page, select the tab “My Communication Preferences”

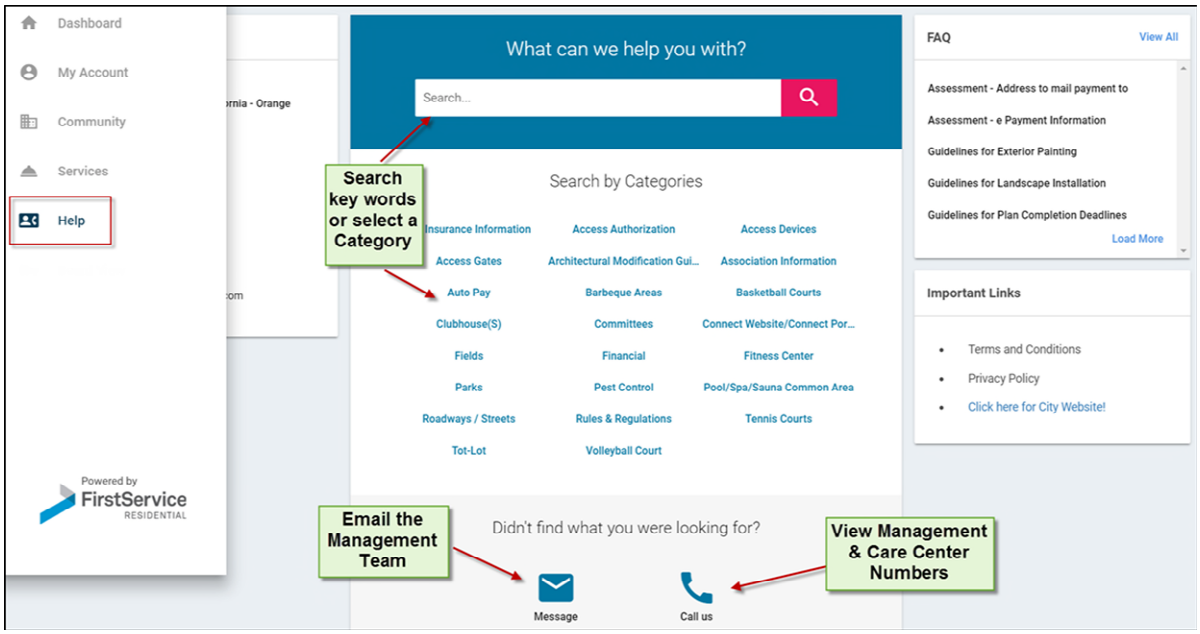


4) Update your preferences to receive your communication via email, text and/or letter by checking the following boxes for each Category. If you are opting in to receive text and/or voice communication, please make sure you add and verify a cell phone number to your account prior to selecting your preference.

- **Emergency:** Examples of emergency communication include notifications on water main breaks, electrical issues, etc. Although you may select to receive communication through more than one channel, some communications may not be distributed via all available channels.

- **Events:** Announcements for community events and activities. Although you may select to receive communication through more than one channel, some communications may not be distributed via all available channels.
- **General Announcements:** Examples of announcements may include community newsletters, reminders, amenity closures due to repairs or maintenance, fire alarm system testing, educational information, marketing material, etc. Although you may select to receive communication through more than one channel, some communications may not be distributed via all available channels.
- **General Delivery:** General notices are available in your community's designated posting location. Choose email or letter only if you would like to receive general notices directly. General notices include, but are not limited to, Board/Election meeting notices, notice of proposed rule changes, election information/results. For a detailed listing of the documents, visit the Documents & Forms section of the community website.
- **Individual Delivery:** By choosing the email check box, you will give consent to receive association documents which require Individual Delivery via electronic mail, in accordance with CA Civil Code 4040(a)(2). Individual Delivery documents include, but are not limited to, annual audit, budget information, Board meeting minutes, violation/hearing letters, and insurance coverage information. For a detailed listing of the documents, visit the Documents & Forms section of the community website.
- **Automated Notifications:** If applicable, you can set up your preference on how you would like to receive your notifications.
    - o **All Packages to my Unit:** When a package is scanned for anyone listed within the unit.
    - o **My Packages Only:** Only receive package notifications for any items received under your name.



HELP

Access the Support section to search community information, or to contact the management team. The Customer Care Center is available for fast, live support 24/7 at **1-800-428-5588**.