

Making a Difference.  
Every Day.

**Isabella Village**



Homeowner's Association  
Website Familiarization Seminar  
August 15, 2017



# What We'll Cover Today

- Difference in Association Accounts



- FSR Connect Accounts (Homeowner Portal)

- What is on the website?
- How to access

- ClickPay Accounts

- Setup
- One Time Payment
- Recurring Payments





# Two Associations, One Home

Savannah (Master) Association-667

Isabella Village (Sub) Association-668

- Association Alignments
  - Meetings
  - Assessments

SECTION I



FirstService Residential  
**CONNECT**

<http://texas.fsrconnect.com/savannah>

<http://texas.fsrconnect.com/isabellavillage>



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# FirstService Residential CONNECT

Step 1  
Click 'Use  
Registration Code'  
then click Submit

## Isabella Village Homeowners Association

### Register Now

#### Have a registration code?

If you received an FSRConnect registration code, please enter it here

Use Registration Code



#### OR Register without a code

Register for FSRConnect (homeowners only, please)

Enter your email address:

Submit

### FSRConnect™ – Your Powerful Community Connection and Communication Tool

FSRConnect is your personal lifestyle hub and the lifeline to your community. With just a few clicks, you can easily and securely pay association fees, initiate work orders, download meeting minutes, view your community website, see a calendar of events, book amenities, communicate with your Property Manager, Board members and neighbors, and much more – 24/7 from any computer, smartphone or tablet. As the industry leader, FirstService Residential is the only property management company that gives you the power to instantly connect, communicate and access information about your community. So sign up for FSRConnect and see how living connected can make a difference for you every day!

Connect to your community with valuable features and capabilities to enhance your lifestyle. You can quickly and easily:

- Stay Updated and Track your Properties
- Stay Updated and Track your Accounts
- Stay Updated and Track your Occupants

#### Get access to some of our many community website features:



Account Details



Forms & Documents



Community Details



Work Orders



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# FirstService Residential CONNECT



Managed by: **FirstService Residential Texas, Inc.**

-- Welcome To The Registration Page of Your Community Website --

Follow these 3 easy steps to complete your registration process:

This page will allow you to create an account in your Association's Community Website. You must first have available the personal registration code sent to you by your Association. Once you have completed the registration process, you will be redirected to your Community Website where you will be able to enjoy all of its features.

Step 1: Enter your code

STEP 1: Please enter your registration code below:

Step 2: Select your name

Step 3: Specify your login information

Your Registration Code can be found by calling the HOA office at 972-346-3020 or in your Welcome Letter.

Step 2  
Enter your  
'Registration Code'  
then click Continue



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RESIDENTIAL



# FirstService Residential CONNECT

Step 3  
Enter your email  
address

Step 4  
Create a  
passcode



Managed by: **FirstService Residential Texas, Inc.**

-- Welcome To The Registration Page of Your Community Website --

Follow these 3 easy steps to complete your registration process:

This page will allow you to create an account in your Association's Community Website. You must first have available the personal registration code sent to you by your Association. Once you have completed the registration process, you will be redirected to your Community Website where you will be able to enjoy all of its features.

Step 1: Enter your code

Isabella Village

Step 2: Select your name

John Smith

STEP 3: Please enter your email address and create a new 4-20 character passcode. These will be used to log into your community website.

Step 3: Specify your login information

Email

Address:

Verify Email:

Passcode (4-20 characters):

Verify Passcode:



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# FirstService Residential CONNECT

## Isabella Village Homeowners Association

[my community](#) | [my account](#) |

### my community

From here you can access information and tools for your community. Please choose from the options below:



#### forms and documents ▶

Access forms and documents for your community

[6 forms & documents](#)



#### calendar ▶

View community events and meetings

[0 Upcoming Event\(s\)](#)



#### community details ▶

Get answers to commonly asked questions about your community



#### submit a work order ▶

Submit a work order

[0 open work order\(s\)](#)



#### contact the manager ▶

Contact the property manager for concerns or feedback



#### directory ▶

View community information, management team, board and committee members



#### board projects ▶

View the list of board projects for your community

[0 open project\(s\)](#)



#### resident directory ▶

Search for resident contact information

#### links

[Pay Dues Online](#)

[FirstService Residential](#)

#### news

[No recent news](#)

You're IN!



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# FirstService Residential CONNECT

- Forms and Documents
  - Association Governing Documents
  - Board Meeting Minutes
  - Speaker Card Responses
- Submit a Work Order
  - Isabella Village Common Area Only
  - Be Specific
- My Account
  - View Balance and recent activity
  - Billing Address
  - Pay Assessment

So Now What?



# FirstService Residential CONNECT

## Isabella Village Homeowners Association

my community | my account

### my community

From here you can access information and tools for your community. Please choose from the options below:



forms and documents ▶  
Access forms and documents for your community  
6 forms & documents



calendar ▶  
View community events and meetings  
0 Upcoming Event(s)



community details ▶  
Get answers to commonly asked questions about your community



submit a work order ▶  
Submit a work order  
0 open work order(s)



contact the manager ▶  
Contact the property manager for concerns or feedback



directory ▶  
View community information, management team, board and committee members



board projects ▶  
View the list of board projects for your community  
0 open project(s)



resident directory ▶  
Search for resident contact information

#### links

[Pay Dues Online](#)  
[FirstService Residential](#)

#### news

No recent news

Your Governing Documents at your leisure



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# FirstService Residential CONNECT



[my community](#) | [my account](#)

## forms and documents

Below is a list of all the forms and documents available for your community:

Category	Documents
<a href="#">Board and Committee Meeting Minutes</a>	43
<a href="#">Monthly Management Reports</a>	0
<a href="#">Weekly Management Reports</a>	0
<a href="#">Safety Meeting Reports</a>	0
<a href="#">Website News</a>	0
<a href="#">Association Documents</a>	14

[Back](#)

### links

[Pay Dues Online](#)  
[FirstService Residential](#)

### news

No recent news

View All your Documents and Board Related items






# FirstService Residential CONNECT


## Isabella Village Homeowners Association


my community | my account


### my community


From here you can access information and tools for your community. Please choose from the options below:


 **forms and documents** ▶  
Access forms and documents for your community  
[6 forms & documents](#)


 **calendar** ▶  
View community events and meetings  
[0 Upcoming Event\(s\)](#)


 **community details** ▶  
Get answers to commonly asked questions about your community

 **submit a work order** ▶  
Submit a work order  
[0 open work order\(s\)](#)

 **contact the manager** ▶  
Contact the property manager for concerns or feedback

 **directory** ▶  
View community information, management team, board and committee members

 **board projects** ▶  
View the list of board projects for your community  
[0 open project\(s\)](#)

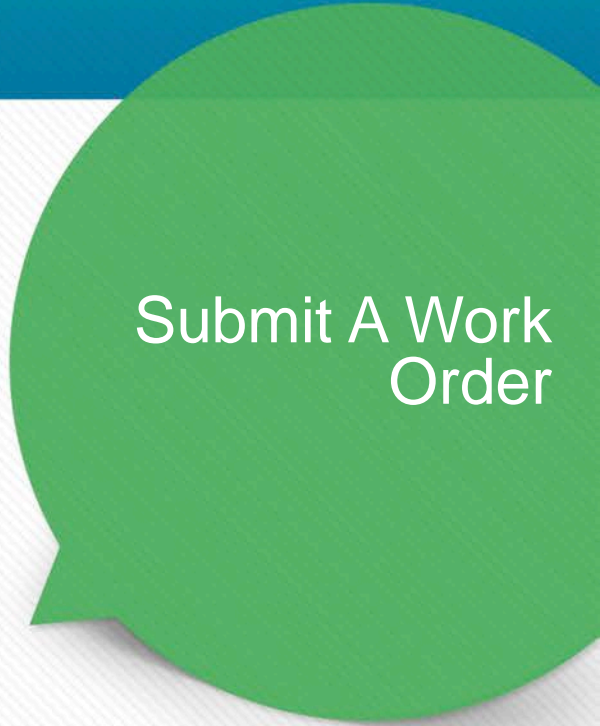
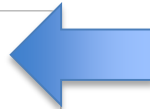
 **resident directory** ▶  
Search for resident contact information

**links**

[Pay Dues Online](#)  
[FirstService Residential](#)

**news**

No recent news





# FirstService Residential CONNECT



[my community](#) | [my account](#)

## my community : submit a work order

Request a work order to the manager.

Category:

Description:

Phone:

Email:

### links

[Pay Dues Online](#)  
[FirstService Residential](#)

### news

[No recent news](#)

Fill out the  
Standard Form  
and it will notify  
our Maintenance  
Team



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# FirstService Residential CONNECT

## Isabella Village Homeowners Association

my community

my account

### my account

From this area you can access information about your account. Please select from the options below:



#### account balance ▶

View your account balance and transaction history.



#### my unit details ▶

Access detail information for your unit



#### resident directory ▶

Search for resident contact information



#### pay association fee ▶

Pay your association fee online

#### my profile

Keep your profile and contact information up to date.



Billing Address

Passcode

Email Address

view my phone numbers

#### links

[Pay Dues Online](#)

[FirstService Residential](#)

#### news

No recent news

Manage your  
Account 24/7!



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SECTION 2



[www.clickpay.com](http://www.clickpay.com)





## How do I register and create a profile?

In order to use the ClickPay system to make payments, you must register and create a user profile.

1. Please visit [www.clickpay.com](http://www.clickpay.com) or the landing page provided by your property manager to initiate registration.



Make Sure your  
are registered!





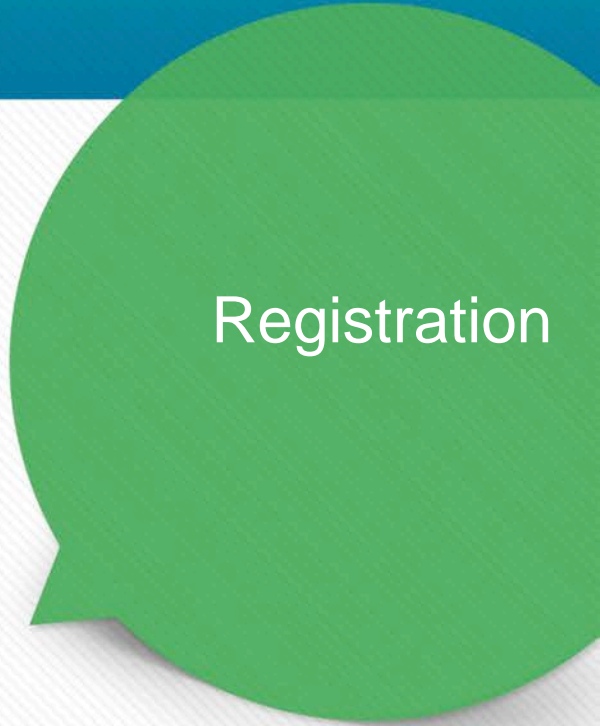
## 2. Please select 'Get Started'




Registration



3. Please create a profile and click 'Create Account' when completed.

A screenshot of the ClickPay registration form is shown. The form is titled "Create profile" and includes the ClickPay logo at the top left. Below the title, there is a section for "Please choose a unique username. If your first attempt is rejected, try adding your full name and/or a number to your desired username." This is followed by a list of required fields: Username/Login, Password, Re-enter Password, First Name, Last Name, Phone, and Email. Each field has a checkmark icon and a small "Required fields" label. Below the fields, there are checkboxes for "Read and accept: Electronic Disclosures" and "Agree to: Terms and privacy policy". At the bottom, there is a dropdown menu for "How did you learn about Us?" and two buttons: "Create Account" (highlighted with a red border) and "Cancel".

 If you own or rent multiple units, you can follow the steps below and add these units to your profile as long as they are in the ClickPay system

## Step 1:

 Select "Add Unit" within your profile



Welcome, test ingt  
(testing123@clickpay.com, testing123@clickpay.com)  
[Logout](#)

 Pay Now

 Auto Pay

[? Help](#) [My Account](#) ▾

### Add Unit

#### My Units

[Address](#) [Apt/Suite/Unit](#) [Region](#) [LLC](#)

No data to display

Add Unit

Unit Setup

## Step 2:

1 Enter your building number and Zip code and click "Search"



Welcome, test ing!  
(testing123@clickpay.com, testing123@clickpay.com)  
x Logout

Pay Now

Auto Pay

Help

My Account -

### Lookup Address

Please enter building number and zip of your property as appears on your mailing address

Building Number <small>(mailing address)</small>	<input type="text" value="2000"/>	<input type="button" value="Search"/>
Zip	<input type="text" value="10024"/>	<input type="button" value="Back"/>

Building Number  
223 E 37th Street  
Apt: 5A  
New York, NY 10001  
Zip Code

Unit Setup

## Step 3:

- Once your unit comes up, please click "Select". If your property manager requires you to enter an account number after you verify your address, please see the next step and screenshot



Welcome, test ing!  
(testing123@clickpay.com, testing123@clickpay.com)  
x Logout

Pay Now

Auto Pay

Help

My Account -

## Lookup Address

Please enter building number and zip of your property as appears on your mailing address

Building Number    
(mailing address)

Zip

E 37th Street   
Apt: 5A  
New York, NY

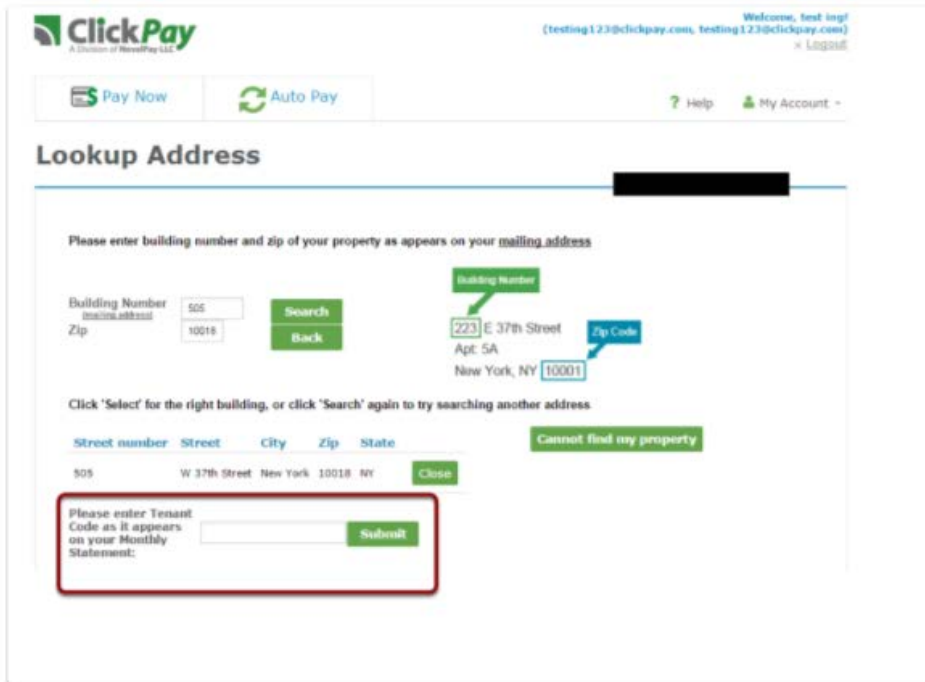
Click "Select" for the right building, or click "Search" again to try searching another address

Street number Street City Zip State

2000 Broadway NEW YORK 10024 NY

## Step 4: (Only If your property manager requires you to enter an account number for your unit)

 The request to enter an account number may appear differently on your screen depending upon your property manager



The screenshot shows the ClickPay 'Look up Address' page. At the top, there is a navigation bar with 'Pay Now' and 'Auto Pay' buttons, and links for 'Help' and 'My Account'. The main heading is 'Look up Address'. Below this, there is a form with the instruction: 'Please enter building number and zip of your property as appears on your mailing address'. The form has two input fields: 'Building Number' (with '505' entered) and 'Zip' (with '10018' entered). There are 'Search' and 'Back' buttons. To the right, a search result is displayed: '223 E 37th Street Apt. 5A New York, NY 10001'. There are callouts for 'Building Number' and 'Zip Code'. Below the search result, there is a 'Cannot find my property' button. At the bottom, there is a table with columns: 'Street number', 'Street', 'City', 'Zip', 'State'. The table contains one row: '505', 'W 37th Street', 'New York', '10018', 'NY'. There is a 'Close' button next to the row. Below the table, there is a red-bordered box containing the text: 'Please enter Tenant Code as it appears on your Monthly Statement:' followed by an input field and a 'Submit' button.

Unit Setup



## How can I make a one-time payment?

Once you add your payment option, please select the 'Pay Now' button on the top left of your screen. Depending upon your property manager, your balance may populate for your account. You can either pay this balance or edit the payment amount by highlighting the amount and typing in your desired payment amount. Once you do this, click 'Continue', review your payment details and click "Authorize Payment."

**\*\*Not all of our landlords present the current balance on the pay now screen\*\***

Step 1: Go to the 'Pay Now' tab and choose to pay the balance presented or enter an alternate amount by clicking on 'Edit' and click 'Continue'

1 Pay Now

2000 Broadway, #15C  
NEW YORK, NY 10024

Balance Due \$2,755.38

2 Edit Charge

- \$2,755.38
- Alternative Amount \$0.00
- Do not pay



3 Apply

Continue

One-Time  
Payment



## Step 2: Click "Authorize Payment"

 NORTHPEAK PROPERTY MANAGEMENT  [Continue](#) Welcome, test ing!  
(testing123@clickpay.com) [Logout](#)

[Pay Now](#) [Auto Pay](#) [Maintenance Request](#) [Help](#) [My Account](#)

### Complete Payment

Property Name	Payment	Amount
2000 Broadway, #15C, NEW YORK, NY 10024	Balance Due	\$2,755.38
Total:		\$2,755.38

[Revise](#)

Click the 'Authorize Payment' button below.  
It may take up to a minute for a payment confirmation to be displayed on the screen and sent to your e-mail address on file.

Pay by:  or [Click here to add/change payment options](#)  
Total: \$2,755.38

[Cancel](#) [Authorize Payment](#)



After authorizing your payment, you will receive an email with a confirmation number for reference.







# How do I set up Automatic Payments?

## Step 1: Select Auto Pay



[Continue](#)

Welcome, test ing!  
(testing123@clickpay.com, testing123@clickpay.com)  
[Logout](#)

[Pay Now](#)

[Auto Pay](#)

[? Help](#)

[My Account](#)

### Pay NOW!

2000 Broadway, #15C  
NEW YORK, NY 10024

[Setup Auto Pay](#)

[View My Statement & Itemized Charges](#)

[Fee Chart](#)

#### LAST PAYMENT

Balance Due

\$2,755.38

[Edit](#)

*No payments made previously*

Send memo with payment

**PAPERLESS BILLING:** You are currently not subscribed to Paperless E-Billing

[SUBSCRIBE](#)

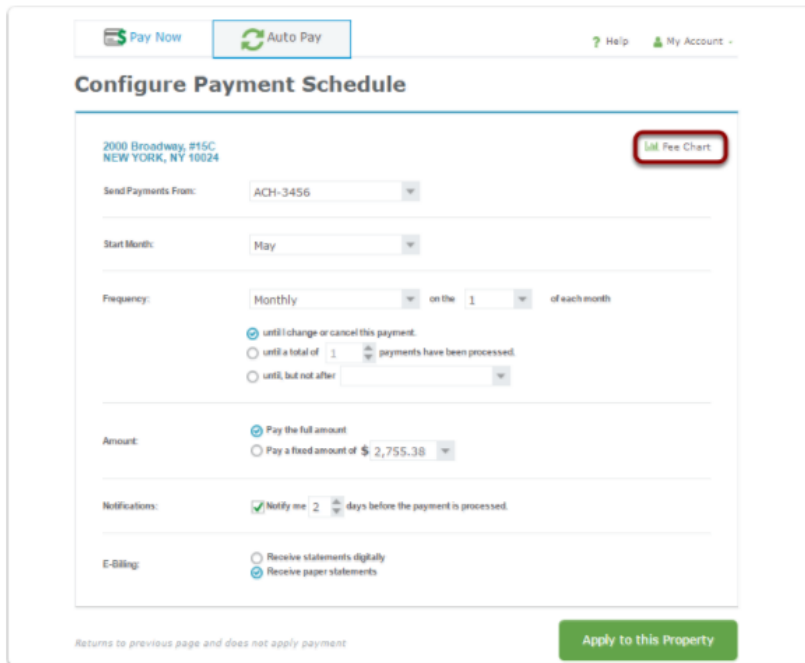
[Continue](#)

Auto-Payments



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Step 2: Enter the information below to setup auto payments and click "Apply to this property. To see what the payment fees are, please click on "See Fee Chart"



2000 Broadway, #15C  
NEW YORK, NY 10024 [See Fee Chart](#)

Send Payments From: ACH-3456

Start Month: May

Frequency: Monthly on the 1 of each month

until charge or cancel this payment.  
 until a total of 1 payments have been processed.  
 until, but not after

Amount:  Pay the full amount  
 Pay a fixed amount of \$ 2,755.38

Notifications:  Notify me 2 days before the payment is processed.

E-Billing:  Receive statements digitally  
 Receive paper statements

[Returns to previous page and does not apply payment](#) [Apply to this Property](#)

## Auto-Payments

- **Send Payments From:** Please select the ACH or credit card account you want the payments processed from
- **Start Month:** Please select the month you want auto payments to start
- **Frequency:** Please select the Frequency (monthly, quarterly, etc) and the date you want payments processed



Depending upon your landlord, you may be able to pay your full amount (balance) or a fixed amount (see below for an example of what this looks like in your settings)

2000 Broadway, #15C  
NEW YORK, NY 10024 [Fee Chart](#)

Send Payments From: ACH-3456

Start Month: May

Frequency: Monthly on the 1 of each month

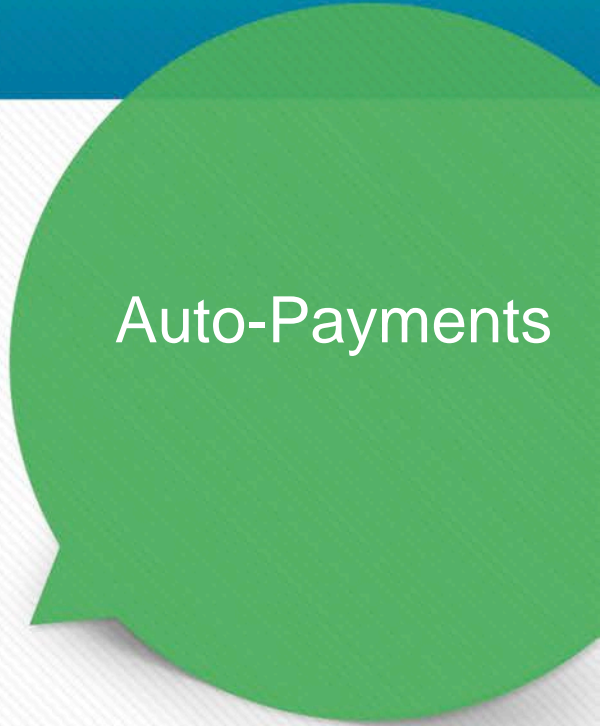
until I change or cancel this payment.  
 until a total of 1 payments have been processed.  
 until, but not after

Amount:  Pay the full amount  
 Pay a fixed amount of \$ 2,755.38

Notifications:  Notify me 2 days before the payment is processed.

E-Billing:  Receive statements digitally  
 Receive paper statements

[Returns to previous page and does not apply payment](#) [Apply to this Property](#)



Auto-Payments



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## How to Edit Auto Payments

You can edit or cancel your auto payments by logging into your account, by selecting **Auto Payments** and then clicking the "Edit" link. See the below screenshot.

Auto-Payments



Continue

Welcome, test ing!  
(testing123@clickpay.com, testing123@clickpay.com)  
Logout

Pay Now

Auto Pay

Help

My Account

### Configure Payment Schedule

2000 Broadway, #15C  
NEW YORK, NY 10024

Period: Monthly  
Starts On: 5/01/2016  
Bill To: ACH-3456  
Payment Details:  
Balance Due \$2,755.38

Edit

Cancel

Print

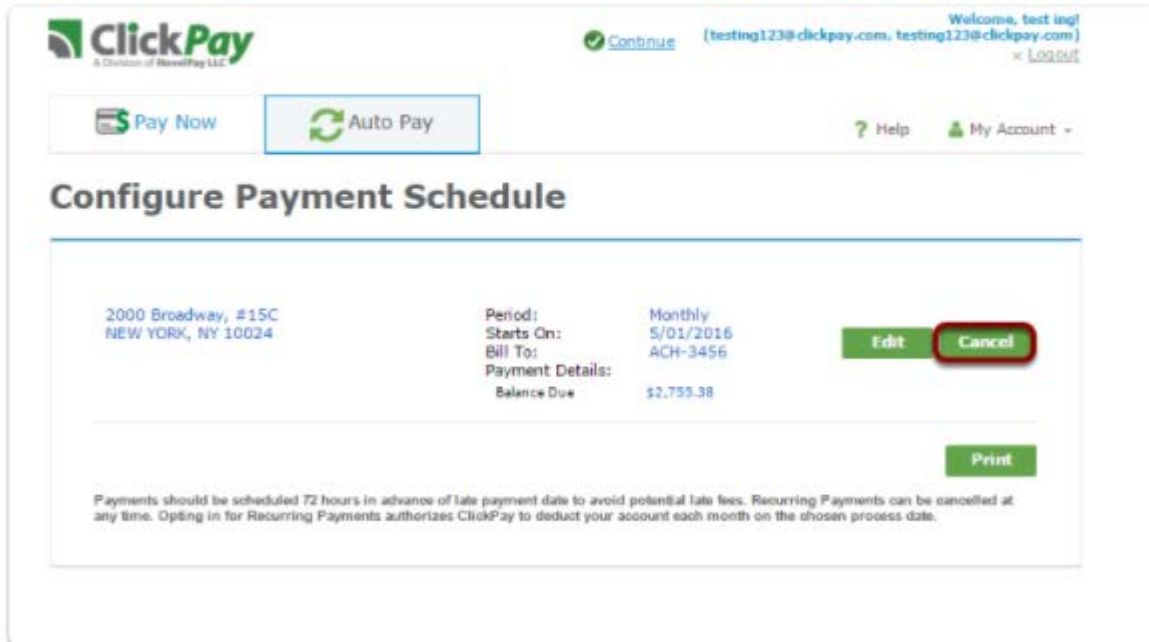
Payments should be scheduled 72 hours in advance of late payment date to avoid potential late fees. Recurring Payments can be cancelled at any time. Opting in for Recurring Payments authorizes ClickPay to deduct your account each month on the chosen process date.



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## How to cancel or stop Auto Payments

**i** To cancel or stop your auto payments, please click "cancel" Auto Payments in the Auto Pay section of your account. See the below image.



**ClickPay**  
A Division of NextPay LLC

[Continue](#) (testing123@clickpay.com, testing123@clickpay.com) [Logout](#)

[Pay Now](#) [Auto Pay](#) [Help](#) [My Account](#)

### Configure Payment Schedule

2000 Broadway, #15C NEW YORK, NY 10024	Period: Monthly	
	Starts On: 5/01/2016	<a href="#">Edit</a> <a href="#">Cancel</a>
	Bill To: ACH-3456	
	Payment Details:	
	Balance Due: \$2,755.38	

[Print](#)

Payments should be scheduled 72 hours in advance of late payment date to avoid potential late fees. Recurring Payments can be cancelled at any time. Opting in for Recurring Payments authorizes ClickPay to deduct your account each month on the chosen process date.

Auto-Payments



# One on One Time

Questions?