



# Client Contact Guide to Caliber Portal

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## Client Contact Guide to Caliber Portal

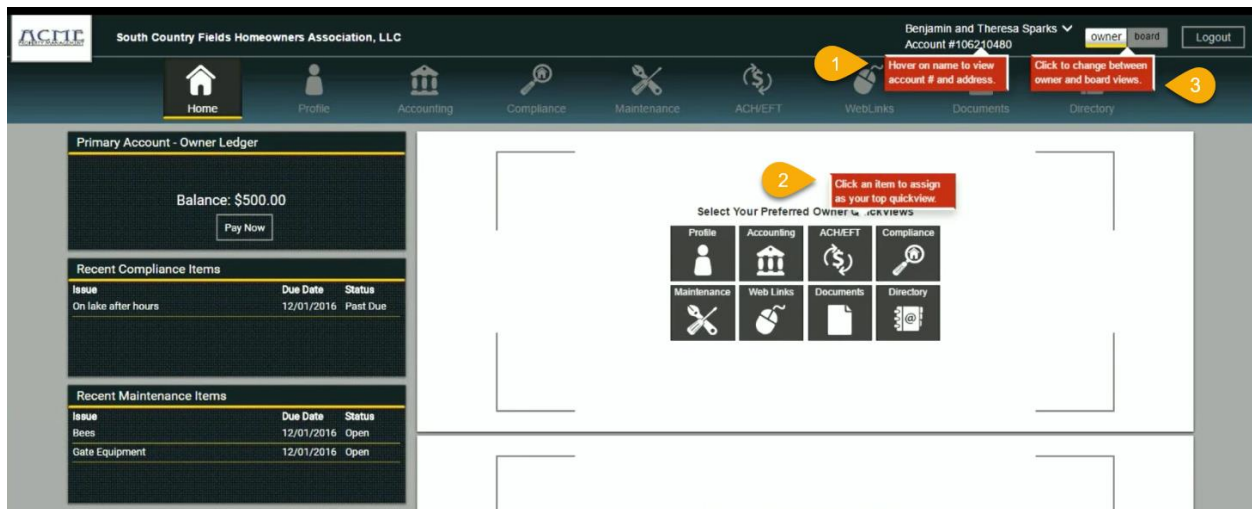
### Introduction

This document will provide detail on Client Contacts functions only. Please keep in mind these features are available at your Management Company's discretion.

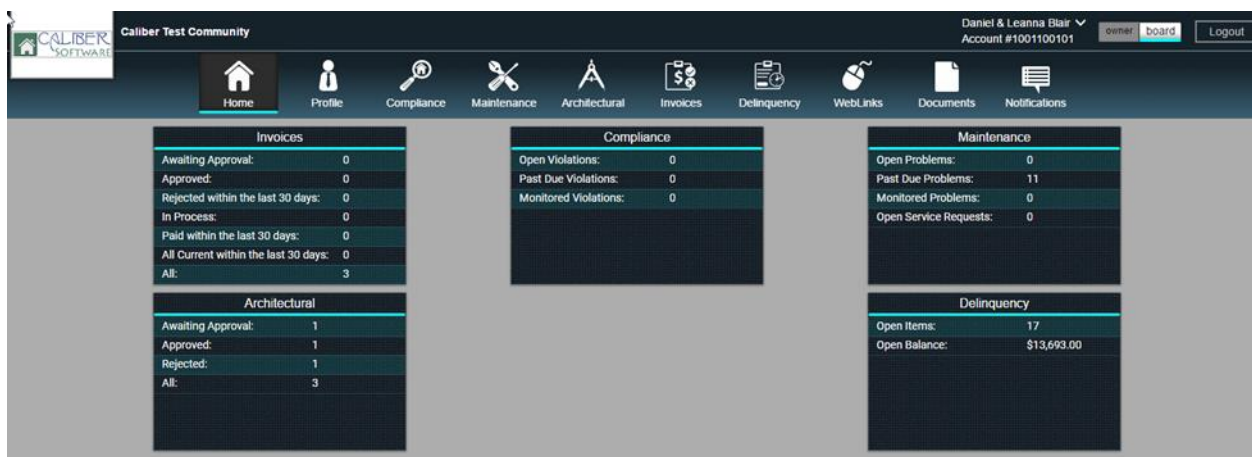
### Home

After registration has been completed, enter username and password to log in. Once logged in, there will be three red boxes in the upper right hand corner. These are here to guide the user when first logging into Caliber Portal.

1. Hover cursor over account name to view Account Number and Address.
2. Click on an item to assign it as your top Quickview (details gone over in Homeowners Guide).
3. Click to change between Owner and Board View. Owners are represented in yellow, while the Board is shown in blue. This gives the user the ability to toggle back and forth.



Once the user has toggled over to the Board side. They will notice the highlight color change, as well as the view. On the Board side the user will have tiles on their Home screen, as well as a full Icon menu across the top. Clicking on any one of these tiles or icons will take the user to that specific area. The tiles and icons will show in accordance with the Management Company's setup.



### Profile

The user will be able to view and edit their profile or contact information.

#### 1. Email Records

- A. Add Record
- B. Edit Record
- C. Delete Record

The screenshot shows the 'Caliber Test Community' interface. The top navigation bar includes 'Home', 'Profile', 'Compliance', 'Maintenance', 'Architectural', 'Invoices', 'Delinquency', 'WebLinks', 'Documents', 'Directory', and 'Notifications'. The 'Profile' section is active. On the left, the 'Available Records' menu is expanded, showing 'Email Records' selected. The main content area displays a table of email records. A red circle 'A' points to the 'Add Record' button. Red circles 'B' and 'C' point to the edit and delete icons respectively.

Email	Type	Primary	Secondary	Use for Mail
gloria.koon@calibersoftware.com	Personal	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
gloria.koon@calibersoftware.com	Work	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

#### 2. Phone Records

- A. Add Record
- B. Edit Record
- C. Delete Record

The screenshot shows the 'Caliber Test Community' interface. The top navigation bar is the same. The 'Available Records' menu on the left has 'Phone Records' selected. The main content area displays a table of phone records. A red circle 'A' points to the 'Add Record' button. Red circles 'B' and 'C' point to the edit and delete icons respectively.

Area Code	Phone #	Type	Primary	Secondary
520	678-8771	Cell	<input checked="" type="checkbox"/>	<input type="checkbox"/>
520	678-9681	Home	<input checked="" type="checkbox"/>	<input type="checkbox"/>

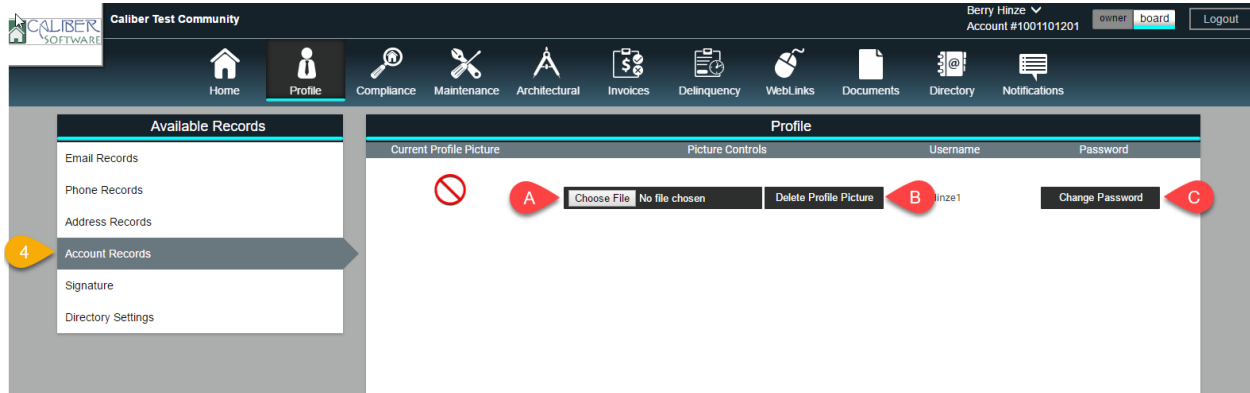
#### 3. Address Records: The user will be able to view their Mailing Address.

The screenshot shows the 'Caliber Test Community' interface. The top navigation bar is the same. The 'Available Records' menu on the left has 'Address Records' selected. The main content area displays a table of mailing addresses. A red circle '3' points to the 'Address Records' menu item.

Mailing Address				
Address	City	State	Zip	Unit
7791 N Silver Ranch Rd	Eagle Mount	UT	84005	

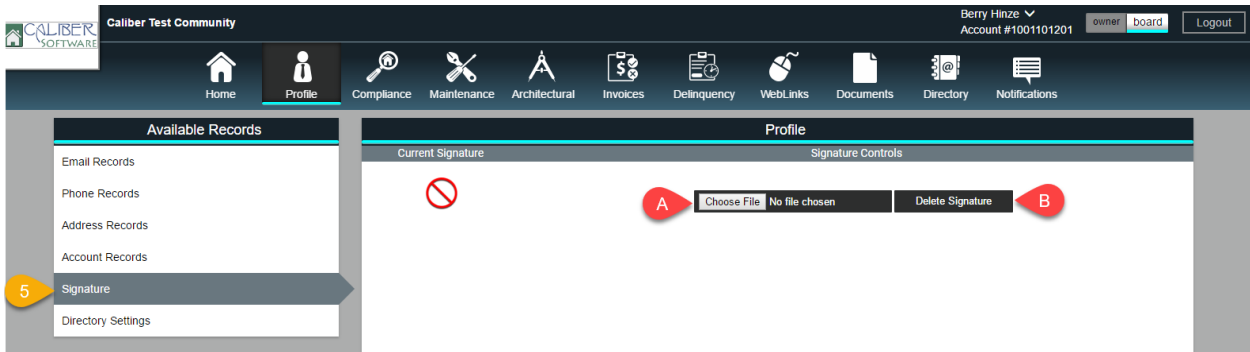
### 4. Account Records

- A. **Choose File** to upload a Profile Picture
- B. **Delete** Profile Picture
- C. **Change** Caliber Portal Password



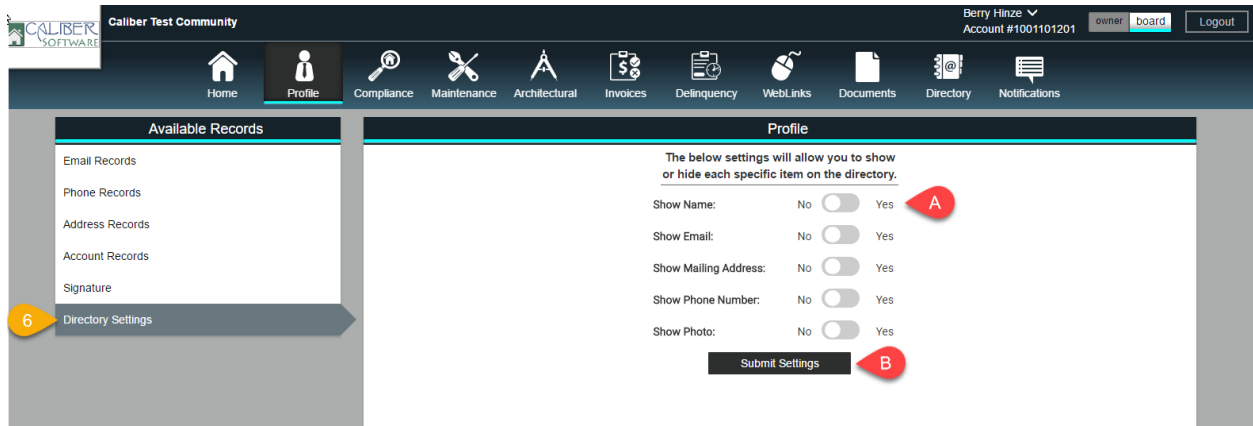
### 5. Signature: The user will be able to upload a digital signature if he or she is an Authorized Board Signer.

- A. **Choose File** to upload digital signature
- B. **Delete** digital signature



### 6. Directory Settings

- A. Choose to Hide or Show by toggling from No to Yes
- B. **Submit Settings** to save

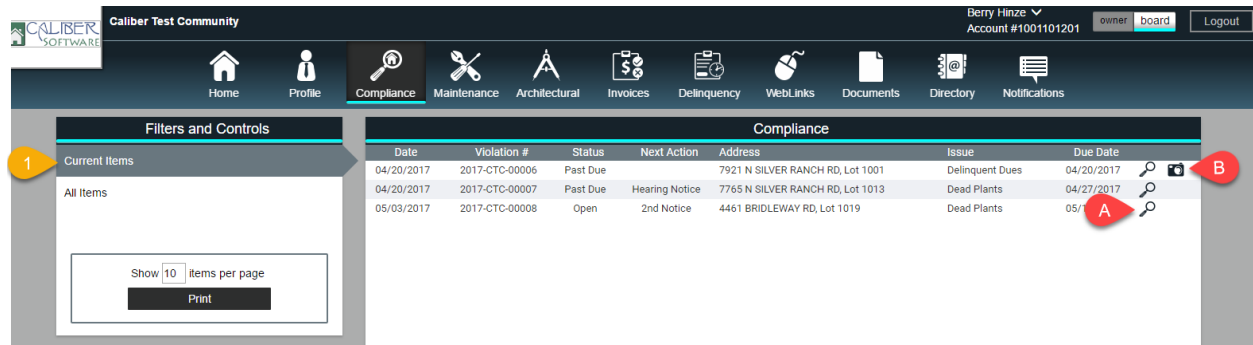


## Compliance

The Client Contact will be able to view any Compliance issues for their Community.

### Filters and Controls

1. **Current Items**
  - A. **Magnifying Glass** Icon displays Violation Details.
  - B. **Camera** Icon displays pictures attached to that Compliance issue.



### 2. All Items

- Adjust how many items are displayed per page.
- Print Compliance History

**Filters and Controls**

Current Items

All Items

Show 10 items per page

Print

**Compliance**

Date	Violation #	Status	Next Action	Address	Issue	Due Date
08/08/2016	2016-CTC-00002	Closed	2nd Notice	7765 N SILVER RANCH RD, Lot 1013	Excessive barking or noise	01/01/2000
09/30/2016	2016-CTC-00003	Closed	Hearing Notice	7791 N SILVER RANCH RD, Lot 1012	Noxious Insects	01/01/2000
01/24/2017	2017-CTC-00001	Closed	Hearing Notice	7829 N SILVER RANCH RD, Lot 1009	Boat parked in driveway or street in front of house	01/01/2000
01/24/2017	2017-CTC-00002	Closed	2nd Notice	7817 N SILVER RANCH RD, Lot 1010	Improperly leashed dog or cat	01/01/2000
02/10/2017	2017-CTC-00003	Closed	2nd Notice	7853 N SILVER RANCH RD, Lot 1007	Dead Plants	01/01/2000
02/10/2017	2017-CTC-00004	Closed	2nd Notice	7765 N SILVER RANCH RD, Lot 1013	Excessive barking or noise	01/01/2000
02/13/2017	2017-CTC-00005	Closed	2nd Notice	4477 E BRIDLEWAY RD, Lot 1020	Patios	01/01/2000
04/20/2017	2017-CTC-00006	Past Due		7921 N SILVER RANCH RD, Lot 1001	Delinquent Dues	04/20/2017
04/20/2017	2017-CTC-00007	Past Due	Hearing Notice	7765 N SILVER RANCH RD, Lot 1013	Dead Plants	04/27/2017
05/03/2017	2017-CTC-00008	Open	2nd Notice	4461 BRIDLEWAY RD, Lot 1019	Dead Plants	05/17/2017

### Maintenance

Within Maintenance, the user will be able to view Maintenance items and Service Requests for the Community, as well as submit new Service Requests.

#### Filters and Controls

##### 1. Current Items

- Magnifying Glass** icon displays Maintenance Details
- Camera** icon displays pictures attached to that Maintenance issue.

**Filters and Controls**

Current Items

All Items

Submit New Request

Show 10 items per page

Clear sorting

Print

**Maintenance**

Date	Work Order #	Status	Location	Issue	Deadline Date
07/23/2015	2015-CTC-00001	Open	7887 N SILVER RANCH RD, Lot 1004	Pipe Broken or leaking	08/06/2015
06/07/2016	1	Open	Tot Lot	Stucco Repair	06/21/2016
01/19/2017	1	Open	Pool Area	Painting	02/02/2017
01/19/2017	1	Open	Sidewalk	BB Court Equipment	02/02/2017

### 2. All Items

- Submit **New Service Request**
- Adjust how many items are displayed per page
- Clear Sorting
- Print Maintenance history

**Caliber Test Community**

Berry Hinze Account #1001101201 owner board Logout

Home Profile Compliance **Maintenance** Architectural Invoices Delinquency WebLinks Documents Directory Notifications

**Filters and Controls**

Current Items

**2** All Items

A Submit New Request

B Show 10 items per page

C Clear sorting

D Print

**Maintenance**

Date	Work Order #	Status	Location	Issue	Deadline Date
01/24/2017	2017-CTC-00001	Open	7829 N SILVER RANCH RD, Lot 1009	Painting	02/07/2017
02/10/2017	1	Open	Monument	Fix Mailbox	02/24/2017
02/10/2017	1	Open	Monument	Fix Mailbox	02/24/2017
02/15/2017	1	Open	Pavement	Pool Equipment	03/01/2017
02/15/2017	1	Open	Pool Area	No Parking sign is down	03/01/2017
02/15/2017	1	Open	Monument	Pool Equipment	03/01/2017
03/17/2017	2017-CTC-00002	Open	7921 N SILVER RANCH RD, Lot 1001	Dead Plants	03/31/2017
04/20/2017	2017-CTC-00005	Open	Pavement	Security Cameras	05/04/2017
04/20/2017	2017-CTC-00004	Open	4461 BRIDLEWAY RD, Lot 1019	Painting	05/04/2017
04/20/2017	2017-CTC-00003	Open	7921 N SILVER RANCH RD, Lot 1001	BB Court Equipment	05/04/2017

« 1 2 »

### Architectural

Within Architectural, the user will be able to Approve, Reject, and View Architectural items for the Community.

### Filters and Controls

#### 1. Awaiting Approval

- Magnifying glass icon displays Architectural Item details

**Caliber Test Community**

Berry Hinze Account #1001101201 owner board Logout

Home Profile Compliance Maintenance **Architectural** Invoices Delinquency WebLinks Documents Directory Notifications

**Filters and Controls**

**1** Awaiting Approval

Approved

Rejected

In Process

All Items

Show 10 items per page

**Architectural**

Start Date	Application #	Request Type	Owner	Address	Status	Board Approvals	Approved	Next Action Date
04/20/2017	000057	Deck	Russell Travis	7911 N SILVER RANCH RD	0 out of 1		06/04/2017	
03/01/2017	000056	Exterior Painting	Russell Travis	7911 N SILVER RANCH RD	0 out of 1		04/15/2017	
02/01/2017	000055	Exterior Painting	Daniel & Leanna Blair	7921 N SILVER RANCH RD	0 out of 1		03/18/2017	

**A**

### B. Approve or Reject item

**Architectural Proceedings**

Application Number: 000057  
 Address: 7911 N SILVER RANCH RD  
 Request Type: Deck  
 Status:  
 Next Action Date: 06/04/2017

**Process Actions**

Date	Step Action
04/20/2017	Created new Architectural Request of type 'Deck'.
04/20/2017	Advanced to 'Architectural Request'
04/20/2017	Advanced to 'Architectural Request'

Notes Unavailable  
 Documents Unavailable

Next Item Close

2. **Approved** items
3. **Rejected** items
4. **In Process** items
5. **All Items**

**Filters and Controls**

- Awaiting Approval
- Approved**
- Rejected
- In Process
- All Items

Show 10 items per page

**Architectural**

Start Date	Application #	Request Type	Owner	Address	Status	Board Approvals	Next Action Date
04/19/2017	000035	Deck	Daniel & Leanna Blair	7921 N SILVER RANCH RD		0 out of 0	06/03/2017



### Invoices

Within Invoices, the user will be able to Approve, Reject, and View invoices for the Community.

### Filters and Controls

#### 1. Awaiting Approval

- A. **Magnifying glass icon** will display the invoice details.
- B. **Approve or Reject** the invoice.

Caliber Test Community

Berry Hinze  
Account #1001101201

Home Profile Compliance Maintenance Architectural **Invoices** Delinquency WebLinks Documents Directory Notifications

Filters and Controls

1 Awaiting Approval

Approved

Rejected within the last 30 days

In Process

Paid within the last 30 days

All Current within the last 30 days

All Invoices

Show 10 items per page

Print

Invoice Date	Payee	Invoice Number	Amount	Status	Board Approvals	Approved	Paid Date	Due Date
04/21/2017	A GARAGE DOOR AND GATE STORE		\$100.00	Created	0 out of 1			04/21/2017

Invoice Details

Payee: A GARAGE DOOR AND GATE STORE

Invoice #:

Invoice Date: 04/21/2017

Due Date: 04/21/2017

Amount: \$100.00

Payment GL Acct: 1000 - Operating

B

Approve Approve/Next

Reject Reject/Next

Reason for rejection

Documents Unavailable

Next Invoice Close

2. **Approved**
3. **Rejected**
4. **In Process**
5. **Paid**
6. **All Current**
7. **All Invoices**
8. Adjust how many items are shown per page
9. **Print**

## Delinquency

Within Delinquency, users will be able to view a list of who is in a Caliber Delinquency Process. This includes the transaction account and the current Delinquency Stage.

1. **Magnifying Glass** will display Delinquency Details

Name	Account #	Group	Address	Stage	Account	Balance
Daniel & Leanna Blair	100110010	Caliber Test Group	7921 N SILVER RANCH RD	Collections-Pending Board Approval	Owner Ledger	\$634.00
Russell Travis	100110020	Caliber Test Group	7911 N SILVER RANCH RD	Collections-Pending Board Approval	Owner Ledger	\$1,469.00
Craig & Julie Englande	100110040	Caliber Test Group	7887 N SILVER RANCH RD	Late Notice	Owner Ledger	\$50.00
Joseph Dunn	100110050	Caliber Test Group	7873 N SILVER RANCH RD	Collections-Pending Board Approval	Owner Ledger	\$843.00
Peter & Christi Hill	100110060	Caliber Test Group	7863 N SILVER RANCH RD	Late Notice	Owner Ledger	\$724.00
Rodney R Dangerfield	100110070	Caliber Test Group	7853 N SILVER RANCH RD	Collections-Pending Board Approval	Owner Ledger	\$938.00
Braydon Bonham	100110080	Caliber Test Group	7841 N SILVER RANCH RD	Late Notice	Owner Ledger	\$946.00

A. Delinquency Details

Delinquency Details

Name: Daniel & Leanna Blair

Address: 7921 N SILVER RANCH RD  
Eagle Mount, UT 84005

Account #: 100110010

Current Balance: \$634.00

Transactions

Date	Description	Amount	Balance
04/20/2017	Fine - Administration - Delinquent Dues (2017-CTC-00006)	\$50.00	\$634.00
04/20/2017	Fine - Administration - Delinquent Dues (2017-CTC-00006)	\$5.00	\$584.00
04/20/2017	Application Fee	\$50.00	\$579.00
04/20/2017	Application Fee	\$50.00	\$529.00
04/19/2017	Payment of Dues	(\$125.00)	\$479.00
04/19/2017	Application Fee	\$50.00	\$604.00
01/04/2017	Payment of Dues	(\$500.00)	\$554.00
01/19/2016	Late Fee	\$8.00	\$1,054.00
10/19/2015	Late Fee	\$8.00	\$1,046.00
09/21/2015	Late Fee	\$8.00	\$1,038.00

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2

3

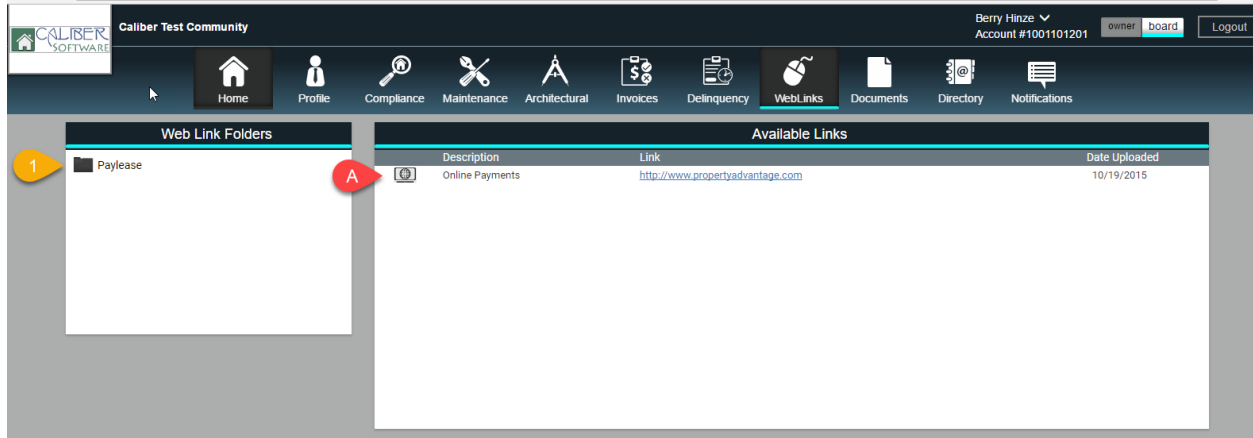
»

Close

### Web Links

Users will be able to view any helpful links provided by the Management Company.

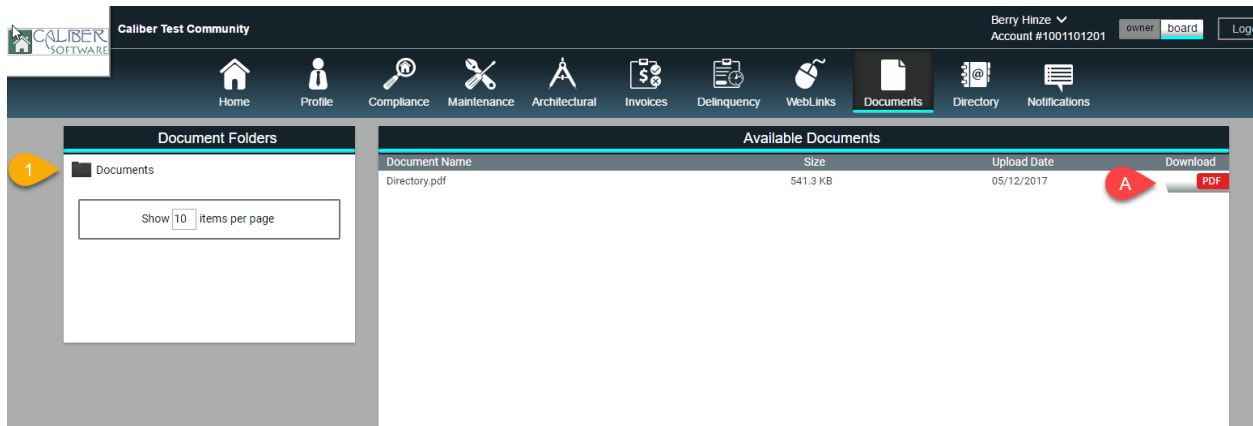
1. Click on a Folder to view links within
  - A. Helpful link



### Documents

Users will be given the ability to view documents set up within folders that are provided by the Management Company.

1. Click on a Folder to view Documents within
  - A. View Document



### Directory

This is where the user will be able to view the Client Contact and Owner Directory based on the Management Company set up.

### Filters and Controls:

1. Select a Directory to view

Caliber Test Community

Berry Hinze Account #1001101201 owner board Logout

Home Profile Compliance Maintenance Architectural Invoices Delinquency WebLinks Documents Directory Notifications

**Filters and Controls**

Owner Directory

BOD

Show 10 items per page

Clear column sorting

**Directory**

Name	Unit Address	Phone	Email
BLAIR, DANIEL & BLAIR, LEANNA	7921 N SILVER RANCH RD, Lot# 1001, Eagle Mount, UT 84005	(480) 699-3621	aimie.minutella@calibersoftware.com
TRAVIS, RUSSELL	7911 N SILVER RANCH RD, Lot# 1002, Eagle Mount, UT 84005	(801) 801-8011	debbie.smith@calibersoftware.com
BROWN, CLINTON & BROWN, AMANDA	7899 N SILVER RANCH RD, Lot# 1003, Eagle Mount, UT 84005		michael.coursey@calibersoftware.com
ENGLAND, CRAIG & ENGLAND, JULIE	7887 N SILVER RANCH RD, Lot# 1004, Eagle Mount, UT 84005		
DUNN, JOSEPH	7873 N SILVER RANCH RD, Lot# 1005, Eagle Mount, UT 84005	(801) 555-1111	darren.jackson@calibersoftware.com
HILL, PETER & HILL, CHRISTI	7863 N SILVER RANCH RD, Lot# 1006, Eagle Mount, UT 84005		michael.coursey@calibersoftware.com
DANGERFIELD, RODNEY R	7853 N SILVER RANCH RD, Lot# 1007, Eagle Mount, UT 84005	(801) 444-4444	michael.coursey@calibersoftware.com danielle.harris@calibersoftware.com
BONHAM, BRAYDON	7841 N SILVER RANCH RD, Lot# 1008, Eagle Mount, UT 84005		michael.coursey@calibersoftware.com
CALL, NICHOLAS & CALL, MEGAN	7829 N SILVER RANCH RD, Lot# 1009, Eagle Mount, UT 84005	(801) 765-4321	debbie.smith@calibersoftware.com
COHEN, BRETT & COHEN, MICHELLE	7817 N SILVER RANCH RD, Lot# 1010, Eagle Mount, UT 84005		darren.jackson@calibersoftware.com gloria.koon@calibersoftware.com

### Notifications

Notifications will only be available to Client Contacts that are members of an Architectural Committee.

1. Mark as Read
2. Mark as Unread
  - A. Clear Notifications
  - B. Select number of items to display
  - C. Print

Caliber Test Community

Berry Hinze Account #1001101201 owner board Logout

Home Profile Compliance Maintenance Architectural Invoices Delinquency WebLinks Documents Directory Notifications

**Filters and Controls**

Clear All Notifications

Show 10 items per page

Print

**Notifications**

Notification Item	Mark as
<b>Architectural</b> The following step has been taken in and architectural process: 5/12/2017 - Completed Escalate to Architectural Committee. Posted - 05/12/2017	1 Read
<b>Architectural</b> The following step has been taken in and architectural process: 5/12/2017 - Completed Escalate to Architectural Committee. Posted - 05/12/2017	2 Unread