



WELCOME TO YOUR NEW OWNER PORTAL

Please take a moment to review this informative guide as it pertains to your new online portal. We hope this information will allow you to get the most out of this great new resource!

STEP-BY-STEP GUIDE

GETTING THE MOST FROM YOUR OWNER PORTAL

STEP 1 – ACCOUNT LOGIN

Now that you have received an email with your log-in credentials, navigate to www.halorealestate.com/owner and click on **Account Login**. Enter the email that is your username and the password provided in the email you received.

STEP 2 – OWNER DASHBOARD

After logging in, you will land on the **Owner Dashboard**. Here you will find a snapshot of your account. Any recurring payments, your next scheduled assessment, and any open issues on your account. Use the gray Owner and Association area on the left to navigate through the owner portal.

STEP 3 – MAKE A PAYMENT

After logging in, click on the orange **PAYMENTS** icon or on **Make a Payment** in the left side of the screen. Making a payment through your owner portal provides the convenience of same-day processing. Using your checking or savings account, you may choose from the following payment options:

- **Automatic Draft Payment (ACH) – Preferred Option**
Avoid late fees and put your payments on autopilot! Payments will automatically be drafted on the 5th day of the month in your billing cycle. Set up using your checking or savings account.
- **One-Time eCheck Processing**
Ideal for Special Assessments, or one-time charges.
- **Recurring eCheck**
Set up recurring monthly or quarterly payments using your checking or savings account. You control the date the payment is made. The assessment amount will not automatically update according to your association's amounts. If the amount changes, you will be responsible to come back and update the amount to avoid late fees.
- **Credit Card**
Set up one-time or recurring credit card payments.

STEP 4 – MY ITEMS

This section allows you to follow activity on requests submitted through the Submit a Request page and any open tickets. All activity for your property will be displayed here for a period of 30 days.

STEP 5 – MY CONTACT INFO

VERIFY YOUR CONTACT INFORMATION

Click on **My Contact Info** on the left. Verify your contact information including your email address, phone number and mailing address. This is necessary for your community to contact you concerning community news, emergency matters, and billing concerns. You can elect to hide or display your contact information for the online community directory.



WELCOME TO YOUR NEW OWNER PORTAL

SELECT YOUR BILLING AND COMMUNICATION PREFERENCES

Set your Communication Preference to **EMAIL** to receive real time communication regarding your account and helpful information regarding your community.

Select **EMAIL** for your Billing Preference if you would rather be emailed a statement. Selecting **PAPER** means your bill will be sent as a paper statement or coupon booklet, based on your association's billing preference. **NOTE:** *If you pay using ACH, regular eStatements will not be sent but can be viewed through the owner's portal.*

MAILING ADDRESS AND DIRECTORY PREFERENCE

Owners may change their mailing address in this section. The community directory is visible to all homeowners in the community. If you would like to make your email or phone number visible in the community directory, uncheck the appropriate box. Owners may also elect to hide their name in the directory.

STEP 6 – MY LOGIN: CHANGE YOUR PASSWORD

Click on **My Login** to change your username or password for the Owner Portal website.

STEP 7 – ARC REQUEST

Planning an exterior modification for your home? Click on **ARC Request** to download your community's ARC guidelines and community specific form. This is also where you submit your application and supporting documents as a formal request to your Board or Committee. The work must be **approved** prior to performing any modifications.

STEP 8 – SUBMIT A REQUEST

Choose from 5 different options to get assistance regarding association related matters.

- **Billing Question:** For questions related to your account balance.
- **Work Order/Maintenance Request:** Report property damage or maintenance concerns specific to your unit or common areas within the community.
- **Pool Key Requests:** Gain access or replace your current access device.
- **Fee Waiver Requests:** If you feel there is an erroneous charge on your account, please submit a "Fee Waiver Request" for your Board to review.
- **General Questions:** Submit any other question and let our team help!

STEP 9 – CALENDAR & EVENTS

Stay up to date with events going on in your community.

STEP 10 – COMMUNITY DIRECTORY

View your current Board of Directors, Committees and Homeowners for your community.

STEP 11– ASSOCIATION DOCUMENTS

Find association-related information such as Financials, Governing Documents, Rules and Regulations, Annual Meeting Minutes and other easily accessible documents.