



CONNECT COMMUNITY WEBSITE USER GUIDE

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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. With the site, you can connect to:

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.

Your Personal Homeowner Account: A self-service platform lets you communicate with your management team, submit service requests, check account balance information, download forms and documents, manage your visitor list, obtain package information and much more.

Events and Happenings: Got a case of FOMO*? Never miss a thing by utilizing the new community calendar feature 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 section of your community website to get answers to some of your most common association questions.

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

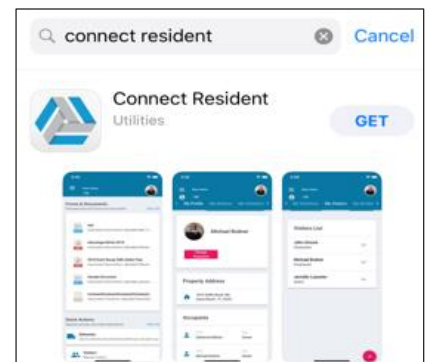
Check out
<http://fsresidential.com/connect> to
learn more about Connect & see the
“Learning Center” tab on the page for
videos on how to navigate the site.



MOBILE APP

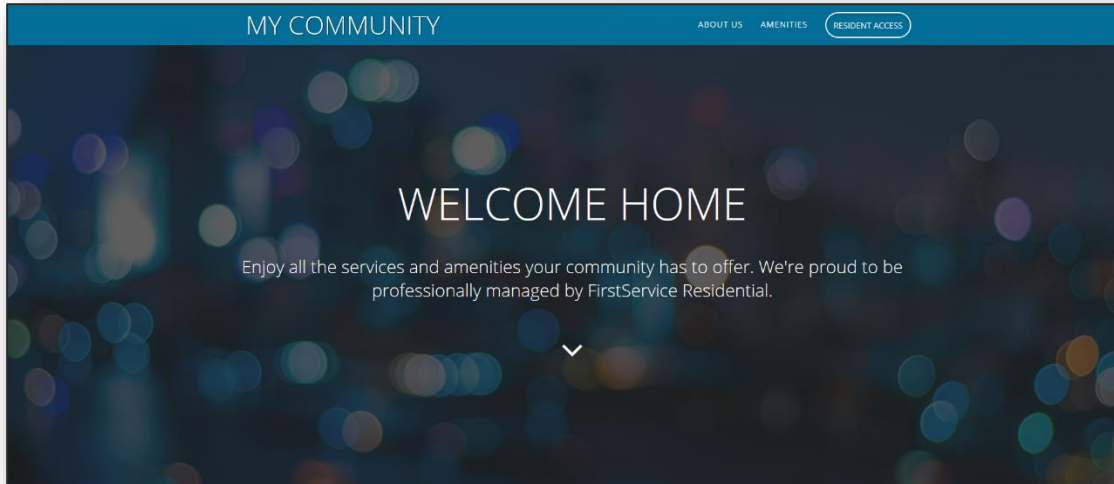
Download the app version of the site! Access your smart phone's App Store and search “Connect Resident” to download the app. The login for the app is the same as the login you set up when you registered for the site.

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

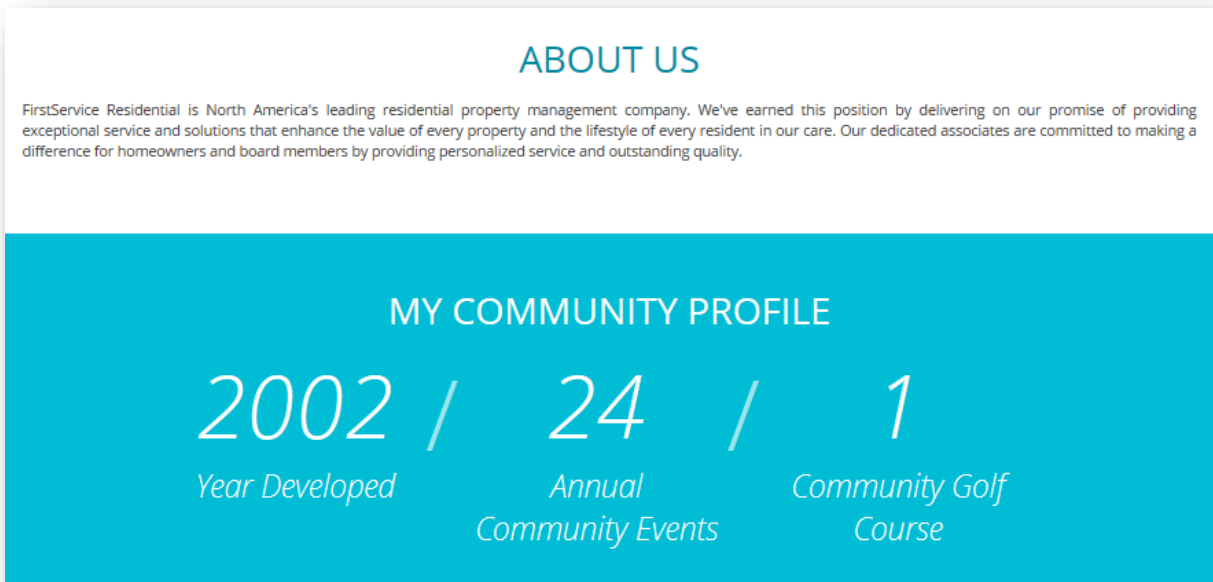


LANDING PAGE

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**


- Highlighting the great features of your community!

AMENITIES




FITNESS CENTER

Fully-equipped fitness center with Star Trac equipment




POOL

Lap pool with pool cabanas and outdoor hot tub




STEAM ROOM

Steam and Sauna Rooms available




24/7 SERVICE

24 hour concierge and security on site




PARKING

Gated entry underground parking available




WINE ROOM

Bayside offers the Private Wine Tasting Lounge 'Enoteca'




THEATER ROOM

Theater room - movie screening room 'Premier'



LIBRARY

Owners' Library on the Mezanine Level




BILLIARDS

Billiards lounge available

- **Resident Access - Registration**

- To log into the site, residents must register. Registration is simply done by clicking **REGISTER on the landing page** and entering in your **email address** and **mobile phone number**. If both are found in our database, you will receive either an email or text to finalize registration. This *2-factor authentication* method ensures the highest levels in security! Residents whose number or email is not found are directed to call our Customer Care Center for fast, live support 24/7 at **1-800-428-5588**.



RESIDENT ACCESS

- Communicate with your management team
- Download forms and documents
- Look up a neighbor's contact information in the community directory...and much more!

Wherever you are and whatever device you use, instant access to your community is always at your fingertips. Easy navigation and 24/7 availability means you can quickly take care of community business at your convenience.

LOGIN

REGISTER

DASHBOARD/HOME PAGE

MY COMMUNITY 10 9 JP

My Balance
View your account activity [View More](#)
1 **BALANCE DUE** N/A
[MAKE PAYMENT](#)

Forms & Documents
Download and print forms and documents [View All](#)
2

- Board Meeting_08/27/2018
Board Meeting Minutes | Uploaded September 20, 2018
- Board Meeting_06/28/2018
Board Meeting Minutes | Uploaded August 24, 2018
- Board Meeting_05/31/2018
Board Meeting Minutes | Uploaded July 6, 2018
- Board Meeting_05/03/2018
Board Meeting Minutes | Uploaded July 6, 2018
- Board Meeting_04/05/2018
Board Meeting Minutes | Uploaded July 6, 2018

Quick Actions
Request services and make reservations [View All](#)

- 3 **Deliveries**
See if a delivery has arrived and where you can pick it up
- 4 **Visitors**
Register visitors
- 5 **Architectural Modifications**
Request approval
- 6 **Service Requests**
Request maintenance, repairs and other services

Knowledge Base
Get answers to frequently asked questions [View All](#)
8
+ Architectural Modification Submittal Guidelines

Calendar
View upcoming events [View More](#)
7
September 2018

SUN	MON	TUE	WED	THU	FRI	SAT
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6

20 Thu LUMI-Private Dining room - A-BK 5pm-11pm
5:00 PM - 11:00 PM

20 Thu Music Room: A-SD 5pm-7pm
5:00 PM - 7:00 PM

20 Thu Music Room: A-SD 5pm-7pm
5:00 PM - 7:00 PM

***PLEASE NOTE THAT NOT ALL FEATURES LISTED BELOW MAY BE APPLICABLE/VISIBLE TO YOUR COMMUNITY.**

1) Balance Due

- Owners can view current account balance total. The Make Payment link directs the owners to ClickPay – our online service for setting up autopay or making payment via credit/debit card.

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) Deliveries*

- Check to see package delivery information!

4) Visitors*

- Enter a guest or visitor to your account.

5) Architectural Modifications* – View the status of a submitted Architectural request under your profile.

6) 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.

7) Calendar

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

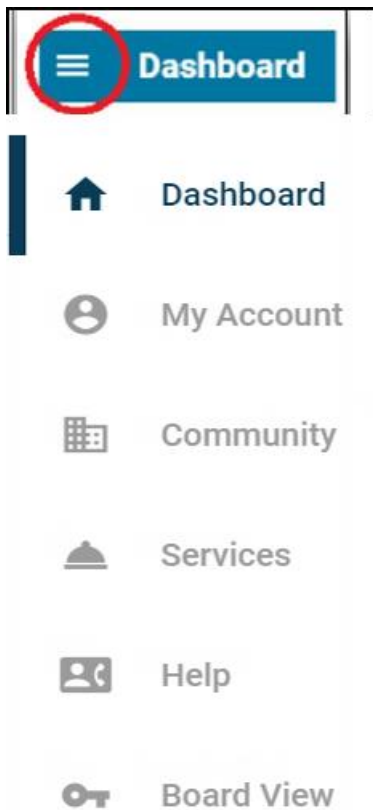
8) KnowledgeBase

- What is the monthly assessment amount? How much does it cost to reserve an onsite amenity? These are all questions that residents can find the answer to within the KnowledgeBase.
 - The most frequently asked questions will display on the dashboard but residents can browse through 200+ questions and answers by clicking View All.

9) My Profile and Properties

- Clicking on your initials in the top right corner will display the list of properties tied to you! This means is 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 and other personal information.

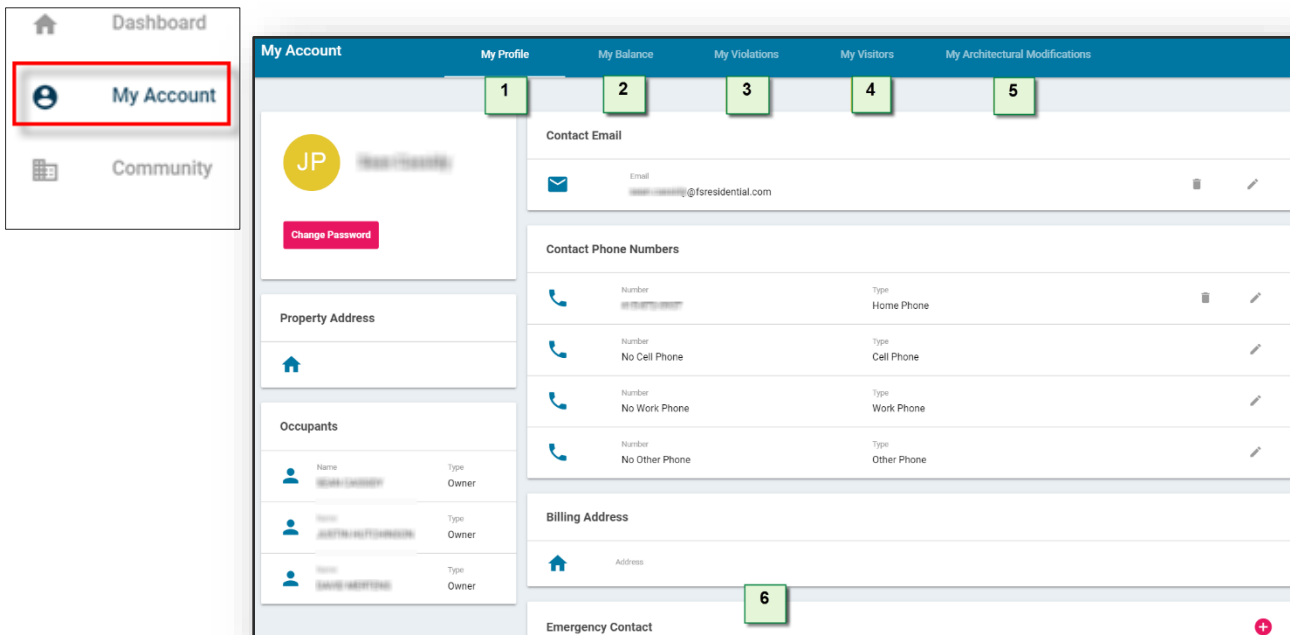
10) Menu (In the upper left-hand corner)



The menu allows you to navigate to:

- **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
- **Help:** The KnowledgeBase and Contact the Manager section
- **Board View:** A Board Member-Only section

MY ACCOUNT SECTION



1) My Profile

- Review and update phone number(s) and email address here. The billing address can be reviewed and if a change is required, reach out to the management team and they will handle the update.

2) My Balance

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

3) My Violations

- View real-time status and historical compliance concerns

4) My Visitors

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

5) My Architectural Modifications

- Owners can view the status of their Architectural change request

6) Emergency Contacts: Emergency contacts can be added from the website to FirstService's database

7) Billing Address: Owners can update their billing address directly through the My Account section

8) Electronic Communication Preferences & Membership List Options: Owners can opt in or out of receiving documents sent from the management team (such as the Budget and Audit) electronically, and can also opt in or out of being included in any requested Membership List.

COMMUNITY

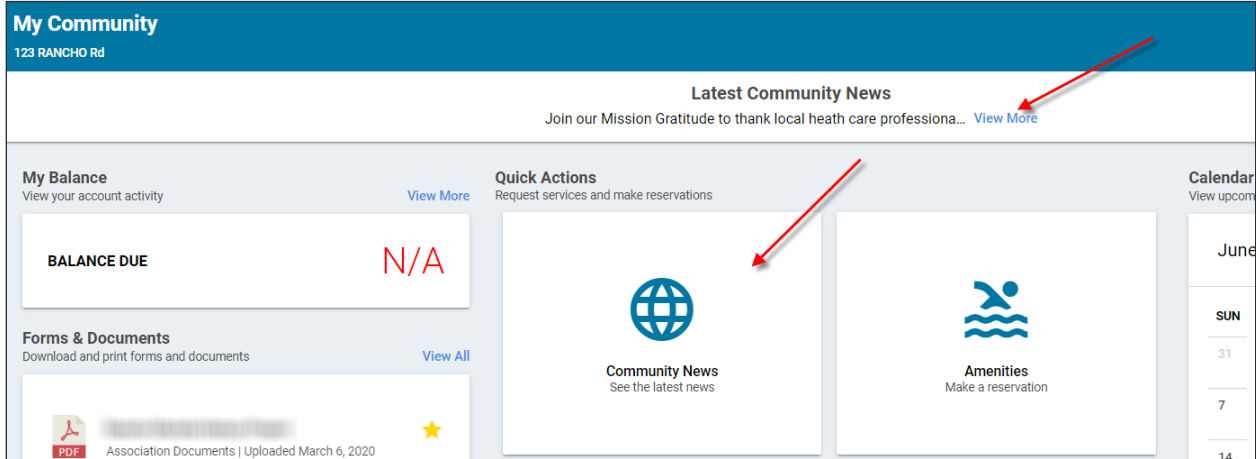
 Dashboard

 My Account

 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



My Community
123 RANCHO Rd

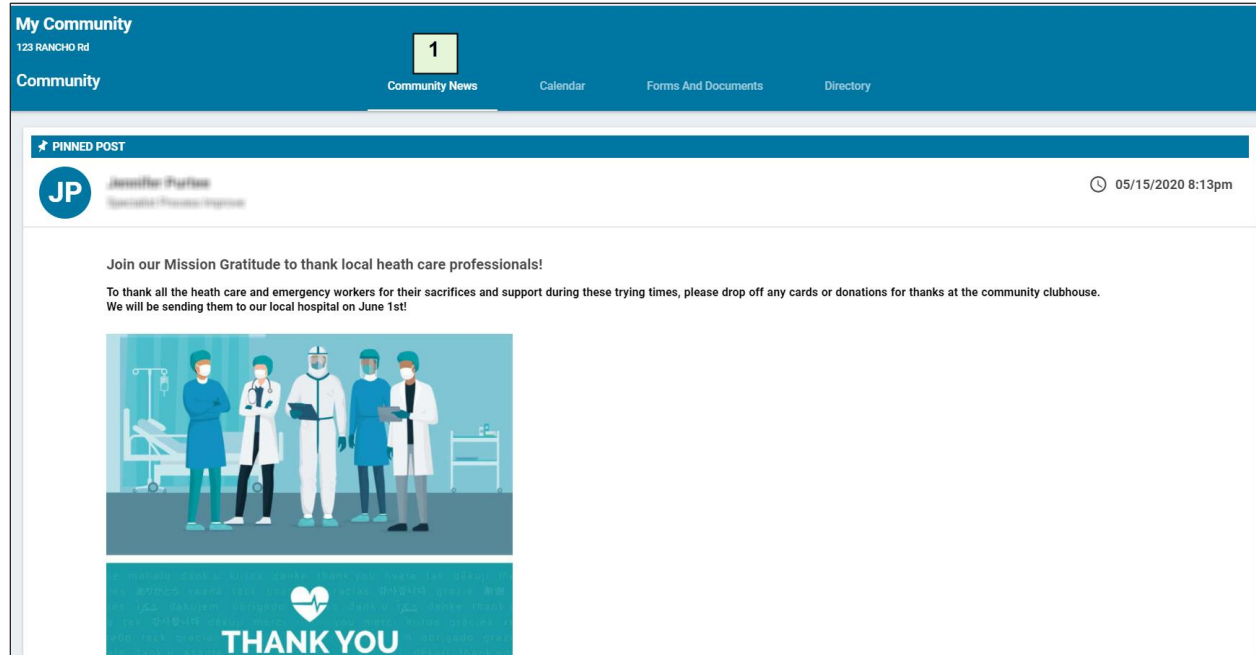
Latest Community News
Join our Mission Gratitude to thank local health care professiona... [View More](#)

My Balance
View your account activity [View More](#)
BALANCE DUE N/A

Quick Actions
Request services and make reservations

Forms & Documents
Download and print forms and documents [View All](#)
Association Documents | Uploaded March 6, 2020

Calendar
View upcoming events
June
SUN
31
7
14




My Community
123 RANCHO Rd

Community **1**
Community News | Calendar | Forms And Documents | Directory

PINNED POST

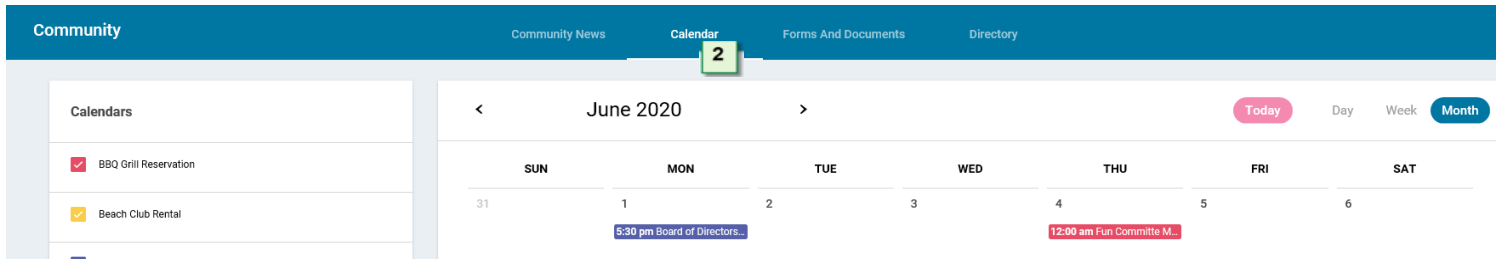
JP Jennifer Puritas
Specialist | Phoenix | Arizona
05/15/2020 8:13pm

Join our Mission Gratitude to thank local health care professionals!
To thank all the health care and emergency workers for their sacrifices and support during these trying times, please drop off any cards or donations for thanks at the community clubhouse. We will be sending them to our local hospital on June 1st!


THANK YOU

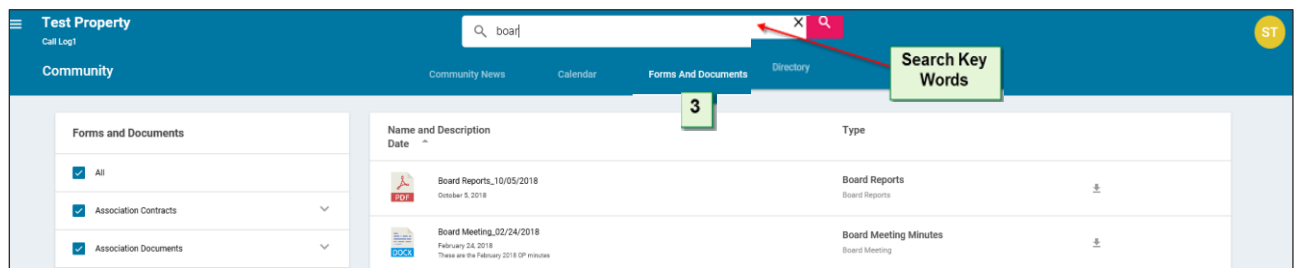
2) Calendar

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



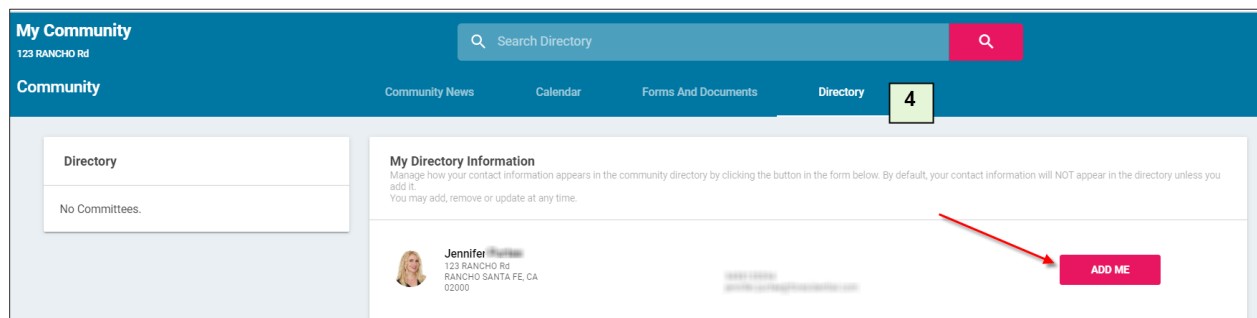
3) Forms and Documents

- Quick and accessible forms, documents, and meeting minutes that can be filtered by type – Search by key word!



4) Directory

- A personal “phone-book” for the community. Residents can **opt in** to displaying their contact info in the directory. 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) **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

A screenshot of the 'Delivery' section within the Services menu. The 'Delivery' tab is selected and highlighted with a green box containing the number '1'. Below the navigation bar is a table with the following data:

Delivered	Sender	Type	Location	Courier	Tracking Number
09/24/2018	Test McGee	Box	At Receiving	Amazon	1234567

- 2) **Service Requests** – 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).

A screenshot of the 'Service Requests' section within the Services menu. The 'Service Requests' tab is selected and highlighted with a green box containing the number '2'. Below the navigation bar is a table with the following data:

Submitted	Type	Category	Progress	Number
07/20/2018	Personal	Sprinkler(S)	Completed	776607

In the bottom right corner, there is a red circular button with a white plus sign. A green callout box with the text 'Create a new Service Request here' has a red arrow pointing to this button.

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** as well.

The screenshot shows the 'HELP' section of a website. On the left is a navigation menu with 'Help' highlighted. The main content area features a search bar with the text 'What can we help you with?' and a search button. Below the search bar is a grid of search categories. At the bottom, there are two call-to-action buttons: 'Message' and 'Call us'. Annotations in green boxes with red arrows point to the search bar, the 'Message' button, and the 'Call us' button.

Search key words or select a Category

Search by Categories

- Insurance Information
- Access Authorization
- Access Devices
- Access Gates
- Architectural Modification Gui...
- Association Information
- Auto Pay
- Barbeque Areas
- Basketball Courts
- Clubhouse(S)
- Committees
- Connect Website/Connect Por...
- Fields
- Financial
- Fitness Center
- Parks
- Pest Control
- Pool/Spa/Sauna Common Area
- Roadways / Streets
- Rules & Regulations
- Tennis Courts
- Tot-Lot
- Volleyball Court

Didn't find what you were looking for?

Email the Management Team

View Management & Care Center Numbers

Message

Call us

FAQ [View All](#)

- Assessment - Address to mail payment to
- Assessment - e Payment Information
- Guidelines for Exterior Painting
- Guidelines for Landscape Installation
- Guidelines for Plan Completion Deadlines

[Load More](#)

Important Links

- Terms and Conditions
- Privacy Policy
- Click here for City Website!

Powered by **FirstService** RESIDENTIAL

BOARD VIEW – BOARD MEMBER ACCESS GUIDE



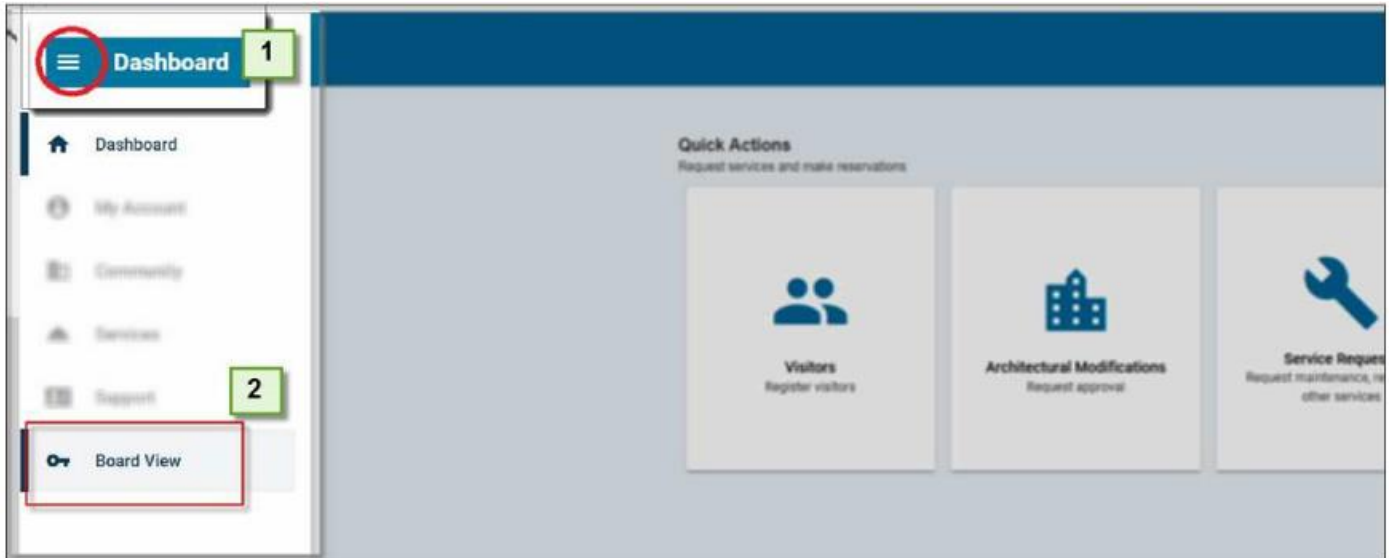
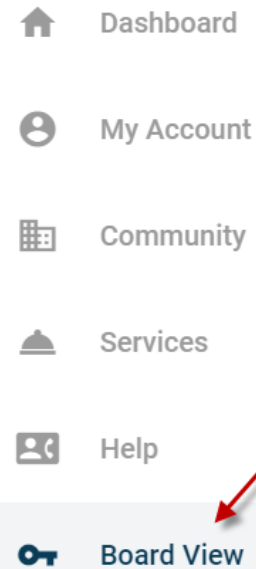
The Board View portion of the menu will only appear for Board Members of the community.

• The Board View section offers reporting and chart options of the data tracked for the community in Connect; Board members have the ability to:

- View current service/maintenance requests
- View Architectural Modification requests
- View violations and their status
- View a list of any vehicles entered within the database
- View a list of pets within the community

As a Board Member, to access this section and its features, please complete the following:

- 1) Click the upper-left hand menu
- 2) Select “Board View”



BOARD DIRECTORY TAB VIEW

The Board View homepage is the Directory screen, which shows the entire community of owners, renters and residents, along with Board members and any specific committee members. The default screen will display all categories; however, the display can be narrowed down with the options below:

- Click on the arrow on the far right-hand side of the owner/renter's name to view specific information for that unit (violations, service requests, etc.)
- To isolate the categories, uncheck the boxes in the menu
- To view specific committees and their members (if applicable), click the dropdown arrow in the Directory menu and all committees will display

The screenshot shows the 'Board View' interface with the 'Directory' tab selected. On the left, a 'Directory' menu is visible with several categories checked: All, Board Members (11), Owners (97), Renters (7), Residents (3), and Committees (7). A red box highlights the 'Directory' menu header, and a red arrow labeled 'b' points to the 'Committees (7)' option. Another red arrow labeled 'c' points to a small dropdown arrow next to the 'Committees (7)' option. The main content area displays a list of members under the heading 'Name and Information'. The list includes Jonatan Alava, Racel Alexander, David Aspiras, Eric Ault, and Becky Becks, all listed as 'owner'. A red arrow labeled 'a' points to the right-pointing chevron icon at the end of the first row (Jonatan Alava).

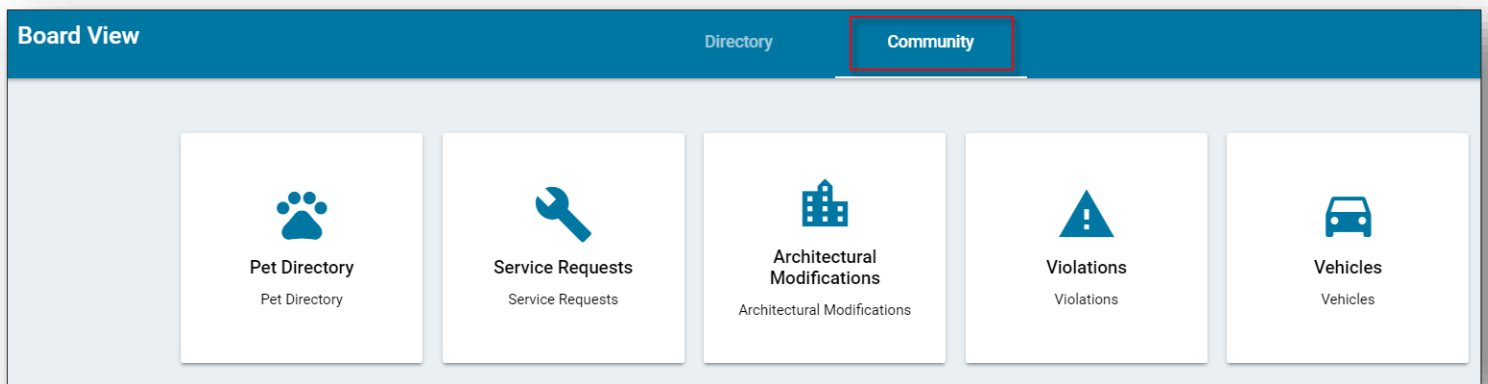
Name and Information	Type
JA Jonatan Alava CWS Test Unit 16 Dania Beach, FL jalava@wysh.ai	owner
RA Racel Alexander CWS Test Unit 36 Dania Beach, FL Racel.Alexander@fsresidential.com	owner
DA David Aspiras CWS Test Unit 14 Dania Beach, FL David.Aspiras@fsresidential.com	owner
EA Eric Ault CWS Test Unit 15 Dania Beach, FL Eric.Ault@fsresidential.com	owner
BB Becky Becks 1815 Griffin Road 101 Dania Beach, FL	owner

BOARD COMMUNITY TAB VIEW – REPORTING AND CHART OPTIONS

In the Board View section, the Community tab is where the following can be viewed in report or chart format:

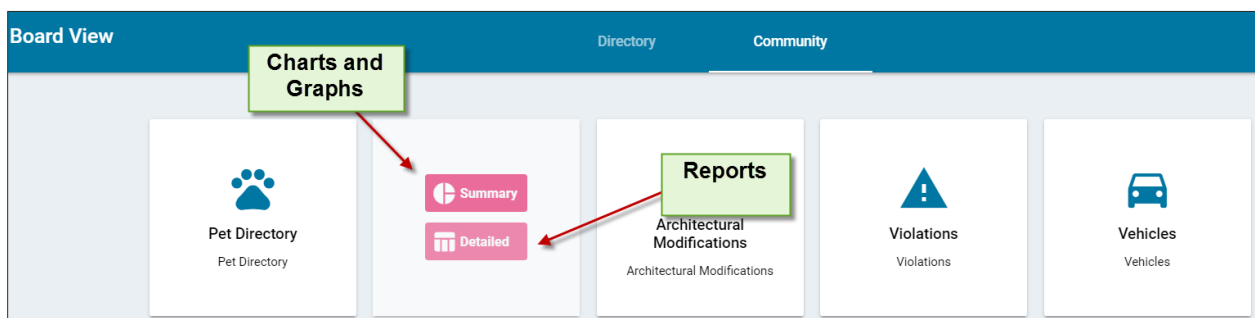
- View current service/maintenance requests
- View Architectural Modification requests
- View violations and their status
- View a list of any vehicles entered within the database
- View a list of pets within the community

Please note that if the information is not tracked for the community in Connect, (i.e. Pet information per owner), the icon may not be visible.

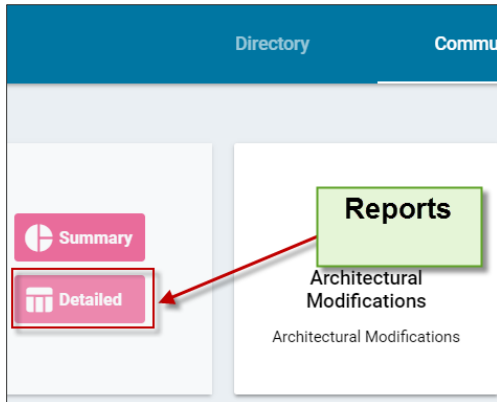


Hover over the desired icon for two options to view the data:

- 1) Select the Reports/Detailed icon on the left side for reporting features on the module
- 2) Select the Chart & Graphics/Summary icon on the right to view the data in chart and metrics format



REPORTS SECTION



In selecting the Reports/Detailed icon, there are various options to pull reports on the various modules (service requests, violations, etc.) at any time! The data can be viewed directly on the screen and can also be exported to a variety of file types.

Please see below for the options in generating reports via the Reports icon.

Report Parameters The report parameters will be set at a default to feature one month's worth of data; the parameters can be changed if desired via the following options:

- 1) **Date Range:** Select a Start and End Date
- 2) **Category** (the list of categories available draws from the service requests created during the selected date range)
- 3) **Sort By:** Date, Category or Unit
- 4) **Status:** All, Open or Closed
- 5) **Show Description:** True (Yes) or False (No)
- 6) **Show History Items:** True (Yes) or False (No)

Click "View Report" to generate the options and then click the Disc icon for various file types to export the data from (Recommended: PDF or CSV)

The screenshot shows the 'Service Request' report generation interface. A red box highlights the filter options: Start Date (10/6/2017), End Date (11/6/2018), Category (Landscape, Fences, Graffiti, Tree Rer), Status (All), Sort By (Date), and Show Description (True). A red arrow points to the 'View Report' button. Below the filters, a 'File Type Menu' is open, showing options: Word, Excel, PowerPoint, PDF, TIFF file, MHTML (web archive), CSV (comma delimited), and XML file with report data.

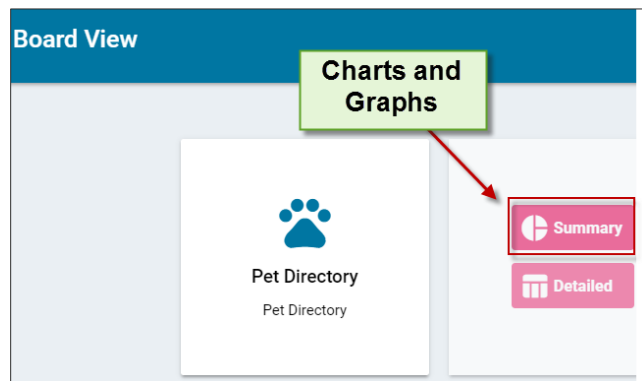
Date	Type	Description
6/7/2018	E-mailed Work Order	WO emailed to vendor
6/7/2018	Work Order Update	Vendor came out same day and ac

SR#	Date Created	Category	Unit / Common Area	Status
759370	5/2/2018	Landscape	Park - Lower	Open

Created By : LATemp
Requested By : CH
Requested Completion Date :
Date Completed :
Completed By :
Description : There is a sprinkler valve near the north east corner.

Date	Type	Description
5/2/2018	E-mailed Work Order	WO sent to Vendor

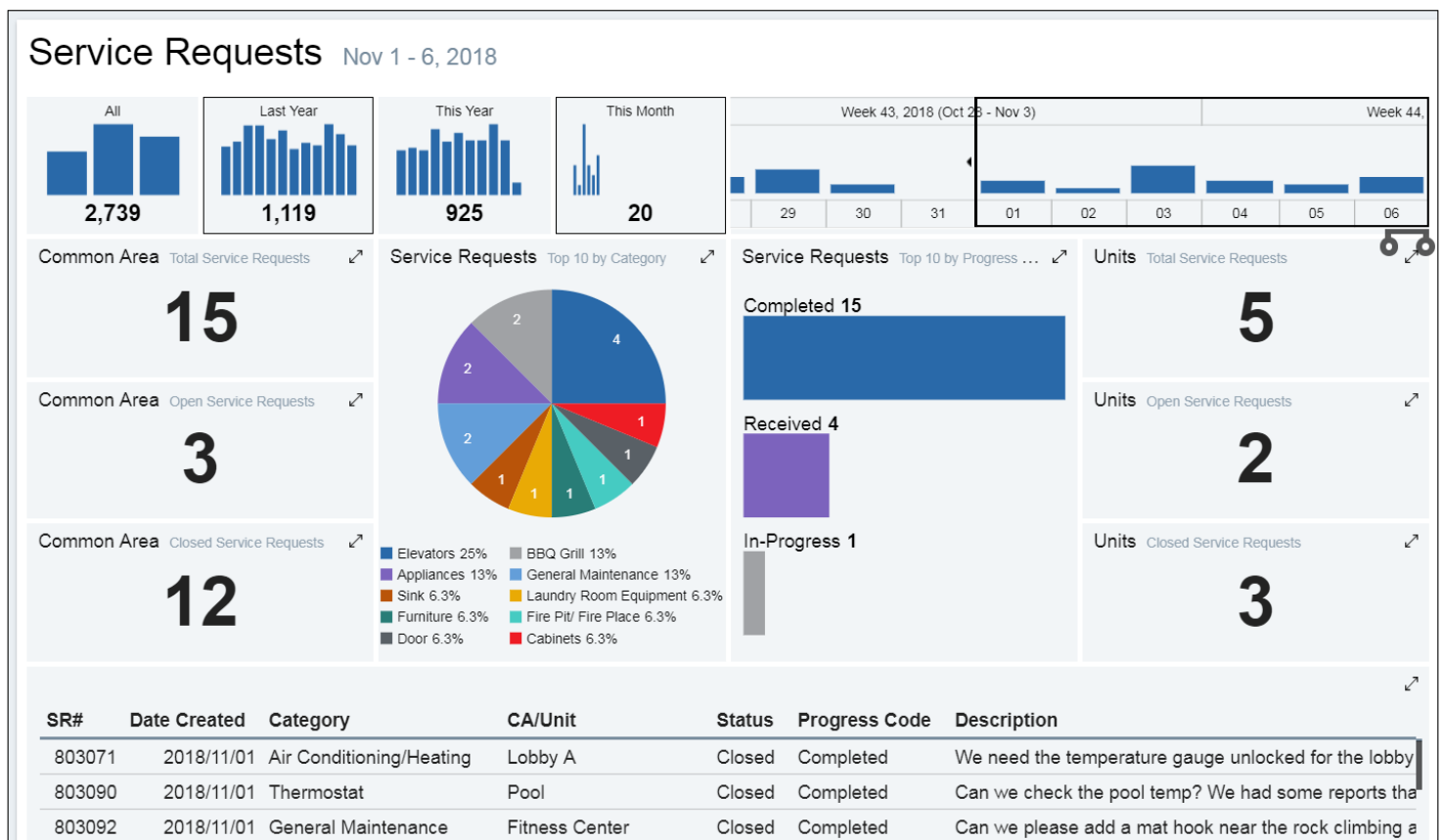
COMMUNITY DATA – CHARTS AND GRAPHICS



In selecting the Charts and Graphics icon, view the various modules' data (service requests, violations, etc.) in chart format at any time!

After navigating to the Board view section → Community Tab, select the Charts & Graphics Icon for the desired module. When this is selected, charts and metrics appear for various date ranges, categories and progress.

Please see below for a sample of the available data, and click the double-arrow icon in the upper-right hand corner of any section to enlarge the area.



REVISED 6/2020