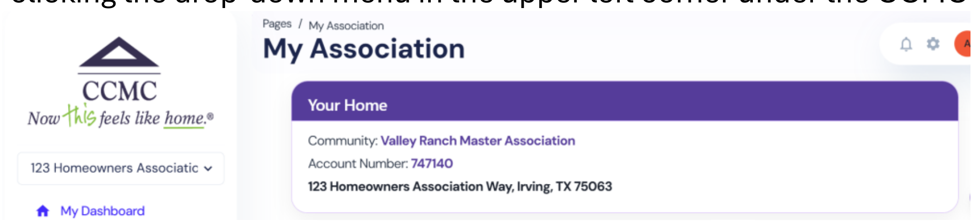
Resident Portal Dashboard How-to Guide

This guide walks you through how to navigate your My Association page. This is your personal HOA account dashboard, where you can view a summary of recent transactions and find quick links to make payments, update your information, and view your compliance history.

Before You Start

- Make sure you're signed in to your resident portal
- If you own multiple properties within your community, or if you own homes in multiple CCMC-managed communities, confirm you're on the correct property account. You can verify this at the top of the page in the "Your Home" section, or by clicking the drop-down menu in the upper left corner under the CCMC logo.

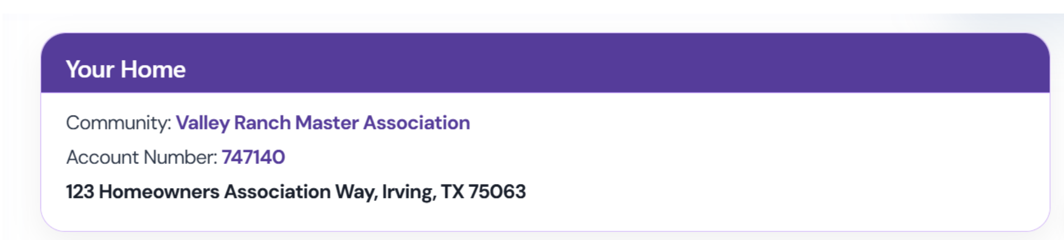


What You Can Do

- View **Recent Transactions**
- **Pay your HOA Bill**
- Update your **Contact Information**
- View open **Compliance**

Your Home

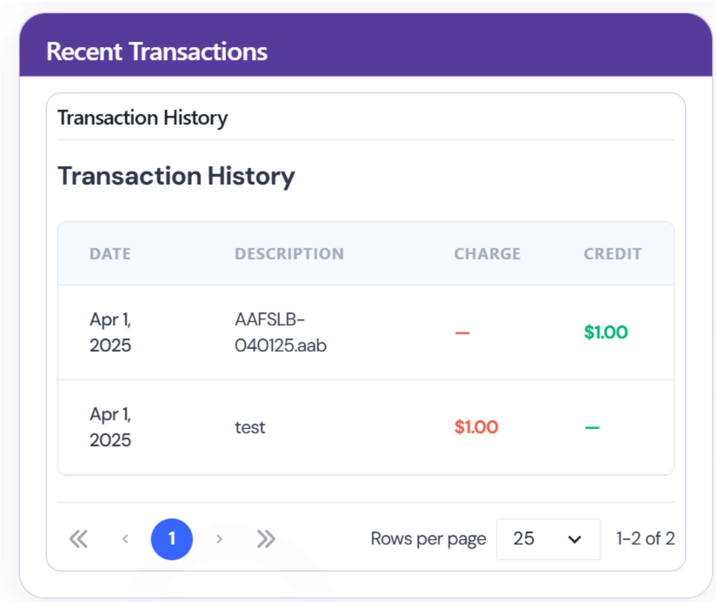
At the top of the screen, under My Association, you'll find the My Home section, which shows your association name, account number, and property address.



Tip: If you own more than one property, check this section before making payments or updates to ensure you're viewing the right account.

Recent Transactions (Middle of the Page)

In the center of the page, you'll see a box labeled Recent Transactions. This is your financial history with the HOA.



The Transaction History table includes:

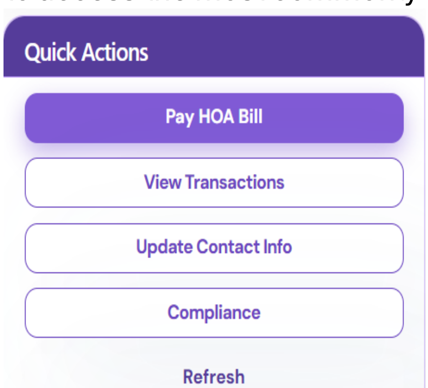
- Date: When the activity occurred
- Description: What the transaction was.
- Charge: Amount billed (red text = money owed)
- Credit: Amount paid or adjusted (green text = money applied)

Navigating the Transaction History table:

- Use arrows to move between pages of transactions
- Adjust Rows per page to show more or fewer entries

Quick Actions (Right Side of the Page)

On the right, you'll find a purple box labeled Quick Actions. This section includes shortcuts to access the most commonly used features within the resident portal.



Those shortcuts include:

Pay HOA Bill: Use this button to make a payment

- If it is your first time accessing your payment portal through the new system, please view the [Resident Portal Pay & View Balance How-To Guide] for instructions on setting up your single sign-on (SSO) with Alliance Association Bank
- Have your payment method ready (card or bank info)
- After paying, return to this page and click Refresh to see your updated balance

View Transactions: View transaction history

- View or download your transaction history

Update Contact Info: Change your phone number, email, or mailing address

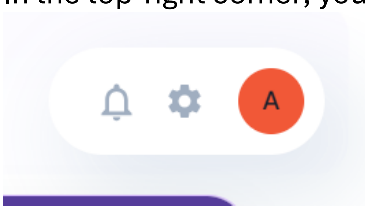
- Keep this updated to ensure you receive important notices

Compliance: View open compliance notices or violations for your property

Tip: After you make a payment or update your contact information, click Refresh to reload your data.

Profile & Settings Icons

In the top-right corner, you'll see:



- Bell icon: Notifications (e.g., new statements)
- Gear icon: Settings or preferences
- Profile circle: Contains your initials; click it to log out or view your profile details

Tip: Always log out if you're using a shared computer.

Tips for success

- **Refresh**: Always refresh your data after making a payment or updating contact info
- **Verify property:** If you own more than one property, verify you are viewing the correct property details before making a payment or updating contact info