

## Setup Scheduled Payments

- **Setup Scheduled Payments** will walk users through setting up a scheduled payment based on a frequency of choice.
- If there are no properties or payment methods established for the profile, users can add them by clicking on the links shown below.

### Payment

Select a Property:

[+ Add a Property](#)

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Select a Payment Method:

[+ Add a Payment Method](#)

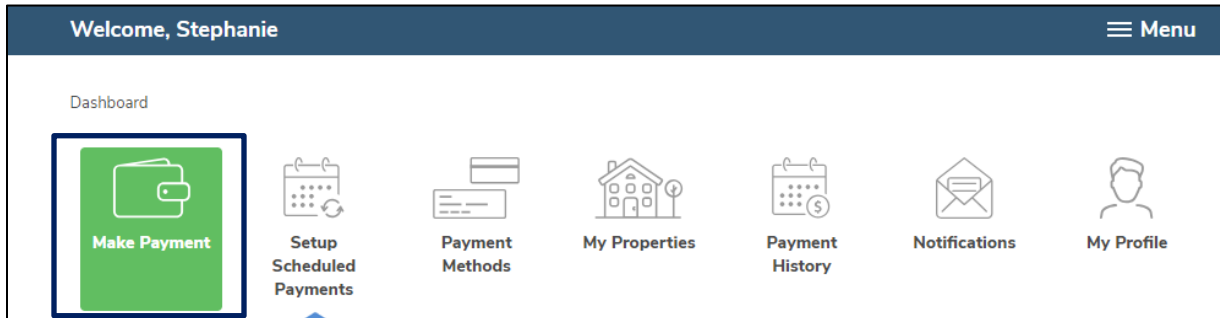
- The payment type will automatically default to the **Scheduled Payment** tab, however, users may toggle between **Scheduled Payment** and **One Time Payment**. Users can make a scheduled payment on a monthly, quarterly, semi-annual or annual basis.
- The **End Date** defaults to *No End Date*, however, users have the ability to establish an end date.

- Once the payment is reviewed and confirmed, it will be presented under **Scheduled Payments** on the **User Dashboard**.

Scheduled Payments				
Property	Next Payment Date	Frequency	Amount	
No Scheduled Payments				
Recent Payments				
Payment Date	Property	Amount	Status	Transaction #
No Recent Payments				
<a href="#">All Payments History &gt;</a>				

## Make a Payment

Selecting *Make Payment* from the **User Dashboard** allows a setup of a one-time payment or scheduled payment. By default, the payment type will be set to one-time.



The screenshot shows the 'Make Payment' form. At the top, there are two toggle buttons: 'One Time Payment' (highlighted with a blue border) and 'Scheduled Payment'. A callout box points to these buttons with the text: 'Toggle between Scheduled or One Time payment.' Below the toggles, there is a 'Payment Amount:' field with a text input containing '\$0.00'. Below that is a 'Payment Date:' field with a text input containing '10/17/2018' and a calendar icon. At the bottom, there are two buttons: 'Cancel' and 'Review Payment' (highlighted with a green background). Below the buttons, there is a note: 'Payments must be received by 4:00 PM Pacific Standard Time for current day business. Processing will complete within 4 business days.'

## Cancel a Payment

Users can cancel a payment from the **User Dashboard** if the payment has not yet been pulled for processing and reflects a 'Pending' status.

- If the cancel option is not available, the payment has already begun processing and cannot be canceled.

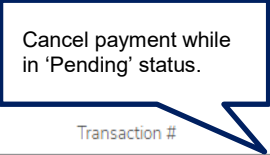
### Scheduled Payments

Property	Next Payment Date	Frequency	Amount
No Scheduled Payments			

### Recent Payments

Payment Date	Property	Amount	Status	Transaction #	
10/17/2018	5101 Coach Drive	\$10.00	Pending	20000007	<a href="#">Cancel</a>

[All Payments History >](#)



## Payment Methods

A user may view or delete any existing payment methods as well as add new methods of payment.

- To add or delete payment methods, click *Payment Methods* from the **User Dashboard**.
- Users can add payment details by selecting *Add Payment Method*. This will require user bank routing and account information.

### Add Payment Method

Bank Account

#### Payment Information

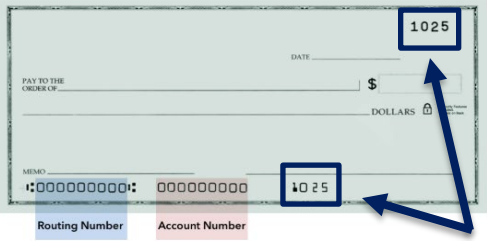
Account Type  
 Checking  Savings

Name on Account:  
required field

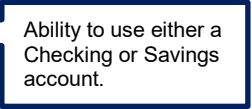
Routing Number:  
required field

Account Number:  
required field

Re-enter Account Number:  
required field



[Back to Dashboard](#) [Cancel](#) [Add Payment Method](#)



Please be sure that the check number is **not included** when entering the account number. The check number appears at the top right corner of the check and at the end of the account number on the bottom right.

## Manage My Properties

- The Homeowner's Online Payment Site Portal allows users to add, edit, or delete a property. Click *My Properties* from the **User Dashboard** to get started.
  - Management Company ID, association ID, property account number are required fields which can be gathered from the coupon, statement or directly from the management company.
  - Nickname (optional) is used to help differentiate between properties.

Dashboard > Payment > Add Property

### Add Property

Management Company ID (A)  
required field

Association ID (B)  
required field

Property Account Number (C)  
required field

Property Nickname (optional)  
Creating a property nickname may help to differentiate multiple properties.

[Back To Dashboard](#) Cancel

Nickname defaults to property address if left blank.

## Review Payment History

- **Payment History** provides the ability to view and search through all transactions, including cancelled and returned payments (also includes one-time payments made outside of the profile using the same email address).
  - Users have the ability to search by property, date, amount, status or transaction number.

### Payment History

Property:  Date:  Amount:

Status:  Transaction #:  Items per page:

Payment Date	Property	Amount	Transaction #	Status
Nothing found for this search.				

## Notifications Overview

- **Notifications** will reflect the correspondence that has been sent to the email address registered with the profile.
  - Notifications include: payment reminders, confirmation of payments, return notices, changes made to the profile, password resets, and change in payment schedule.

## My Profile

- **My Profile** allows users to edit/update name, phone number, email address and password information.

The image shows a screenshot of a web form titled "My Profile". The form contains several input fields: "First Name:", "Last Name:", "Phone Number:", "Email Address:", and "Re-enter Email Address:". There are two green buttons: "Change Password" located to the right of the "First Name" field, and "Edit" located at the bottom left of the form. A blue-bordered callout box with a white background is positioned to the right of the form, containing the text: "Please note that a change in the email address will change the username for login." Lines connect the callout box to the "Change Password" button and the "Email Address" field.