



BOARDROOM NAVIGATION GUIDE

This tutorial is designed to help board members navigate the Boardroom feature as part of the association's CommunityPro® portal website. Board members can access all of the same content as homeowners and, as a board member, are granted access to a privileged section of the portal website that offers unparalleled access and transparency to the day-to-day management of the community.

CLICKABLE LINKS

CommunityPro Portal Boardroom Navigation Guide

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ACCESSING THE BOARDROOM

Along the left side of the portal site is a tab titled 'Boardroom'. Once selected, a drop down of new tab options will appear.

Board members are automatically granted access during the registration process.

- Home
- Online Payment
- My Profile
- Your Ledger Card
- Your Rules & Regulations
- Homeowner Directory
- Calendar
- Information Center
- Boardroom
 - Property Profile
 - Homeowner Profiles
 - Financial Package
 - Boardroom Reports
 - The Community Builder
- Visitor Authorization
- Work Order Request

PROPERTY PROFILE

The ribbon at the top of the page includes selectable links to access an array of categories, including:

Board of Directors - list of existing board member names, titles, terms and contact information

Manager Notebook - notes/ call log entered by Sentry

Mailing Log - tracking of community-wide mailings

Insurance Records - summary of insurance policies on file

Minutes Log - tracking of meeting dates

CPA Roster - tracking of taxes and CPA reporting

Reserve Analysis - calculate and track reserve funding

Termite Bonds - summary of bond information

Property Detail - summary info about the community

Work Order - items requiring vendor repairs, manager action items, and site visit information

SUNNY0 SUNNYLAND ASSOCIATION INC

Board of Directors

Web Admin

Work Orders

Manager Notebook *

Mailing Log

Insurance Records

Minutes Log

CPA Roster

Reserve Analysis

Termite Bonds

Property Detail

Property Profile

Property Information

General Information

Attorney Information

FL Condo retrofitting of fire sprinklers

Rules and Regulation Information

Architectural Control

Amenities

Maintenance Responsibilities

HOMEOWNER PROFILE

The ribbon at the top of the page includes selectable links to access an array of categories, including:

Ledger Card - history of charges and payments, current balance

Rules & Regulations - violation tracking including pictures and status

Architectural - tracking status of applications, committee decisions

Manager Notebook - notes/call log entries by Sentry about this property

Work Orders - service orders submitted for this property

Tenant Notes - tenant info (if applicable)

Homeowner Detail - general info about the homeowner, contact info

Ledger Card	Rules & Regulations *	Architectural *	Manager Notebook *	Work Orders	Web Admin	Tenant notes*	Homeowner Detail	Print Profile	Homeowner Search
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Homeowner Information

Association

SUNNY0 SUNNYLAND ASSOCIATION INC

Owner A/R #

000101

Owner Name

A HOME OWNER

City State

ANYWHERE MX

Work Phone

Property Address Resident?

No

Type

Bill-Pay Acct #

000SUNNY00001018

Designated Voter

Zip Code

12345

Home Phone

222-333-4455

Street #

210

SMI Division

01

Street Address

210 MAGNOL

Country

Cell Phone

111-222-333

Street name

MAGNOLIA R

FINANCIAL PACKAGE

This feature allows board members to generate their own live financial reports with specific content as desired. There are nine (9) reports to choose from.

Report Options

- 1. Period Ending** - This can be a date in the past (archived) or the user can leave the current month and year to generate a real-time financial.
- 2. Output Options** - The user is able to choose between three output options: display on the screen, PDF download, or Excel format.
- 3. Resources** - Additional resources for downloading, reading, and understanding the financial are provided.

Financial Package for SUNNYLAND ASSOCIATION INC

RECONCILED THROUGH PERIOD ENDING 07/2021

The default Period Ending Date includes all live posted activity to date since the Last Period Prepared. To access other financial report periods, enter the month and year you wish to review; choose the type of output file; and check the box(es) to choose the report(s). The financial records for the current year and one year previous are available for download.

To contact the General Ledger Help Desk concerning your association's financial report, [CLICK HERE](#) or email accounting at accountinginfo@sentrymgt.com.

The system notates the last reconciled date; anything after that date is not yet closed for the month.

Period Ending Date **1** 07/2022

Send output to **2** Display

- Cover Sheet including Financial Notes (pdf only)
- Monthly Transaction Register
- Closing Report
- General Ledger

Display

- Balance Sheet
- Check Register
- Accounts Payable Report

- Revenue & Expense Statement
- Accounts Receivable Report
- Sorted Accounts

3 Help section

CLICK FOR HELP IF YOU ARE HAVING DIFFICULTY DOWNLOADING

The system notates the last reconciled date; anything after that date is not yet closed for the month.

BOARDROOM REPORTS

Reports may be generated for any date range on the following topics:

Property Notebook - violation and architectural tracking and status

Work Orders - service request, action item, and site visit tracking and status

Accounts Receivable - status of delinquent homeowner accounts

Cash Receipts Summary - actual funds received and deposited

Purchase Journal - detailed sheet of association expenditures with invoice descriptions.

Detailed Check Register - detailed sheet of checks written

General Ledger - beginning and ending balance of each chart of account for a specific period

Reports for SUNNYO SUNNYLAND ASSOCIATION INC

Available Reports

COMMUNITY MANAGEMENT REPORTS

- [Property Notebook](#)
- [Work Orders](#)
- [General Ledger](#)

ACCOUNTS RECEIVABLE REPORTS

- [Cash Receipts Summary](#)
- [Accounts Receivable Report](#)

Some reports are similar to those generated by the financial package, but allow more options for sorting and date ranges.

COMMUNITY BUILDER

The Community Builder resource page is an library of informational newsletter articles prepared exclusively for Board Members of associations managed by Sentry Management. Articles focus on timely topics relating to association management and the role Boards have in the governance of their community, including:

- Board Meetings
- Community Maintenance
- Community Relations
- Community Safety
- Emergency Preparedness
- Financial Reports
- Budgets
- Homeowner Rights & Responsibilities
- Insurance
- and much more...

Board Education and Planning

6 Tips for Finding Board Members

Board Evaluation, Board Improvement, Committee Members

[PREVIEW](#)[DOWNLOAD](#)

7 Truths for Community Association Board Members

Board Members, Fiduciaries, Board Tips, Meeting Agenda, Officers Liability Insurance

[PREVIEW](#)[DOWNLOAD](#)

Annual Meeting- What is a Proxy?

Annual Meeting, Special Meeting, Quorum, Proxy Type, Quorum Requirement, Limited Proxy, Directed Proxy

[PREVIEW](#)[DOWNLOAD](#)

Association Board of Directors: How Am I Responsible?

Registered Agent, Board Member Roles, Board Member Tips, Board Member Structure

[PREVIEW](#)[DOWNLOAD](#)

Association Legal Counsel... Who Do They Really Represent?

Association Counsel, Shareholders, Legal Counsel, Corporate Representatives, Association, Legal

[PREVIEW](#)[DOWNLOAD](#)

Association Terminology

Bylaws, Rules and Regulations, Articles, Charter, Terminology, Quorum, Board Members, Board Tips

[PREVIEW](#)[DOWNLOAD](#)

INFORMATION CENTER

This feature provides a cloud-based location to access important association documents. Documents can be downloaded or emailed from this application.

1. **Cabinet** - Sentry cabinet provides general documents and information like bank rates, and board education materials. The Association cabinet contains all community-specific info.
2. **Drawer** - The cabinets include drawers specific to all community members, and a separate drawer with privileged access for board members.
3. **Folders** - These provide categories for document storage such as financials, bank statements, insurance, minutes, contracts, and more.
4. **Search feature** - This allows users to narrow down their search by date or keywords.

Information Center

1

Cabinet

Association Records

From

mm/dd/yyyy



2

Drawer

Community Information

To

07/11/2022



3

Folder

Governing Documents

4

Subfolder

ALL

List by

Date or Description

Sort by

Most recent date first or Oldest date first

Description

5