



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.

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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

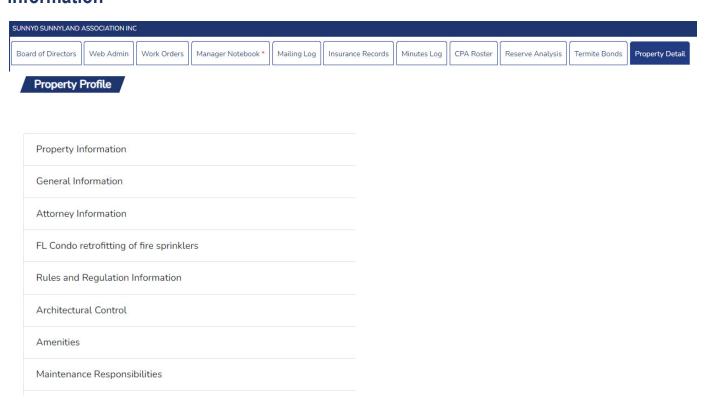
CPA Roster - tracking of taxes and CPA reporting

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



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

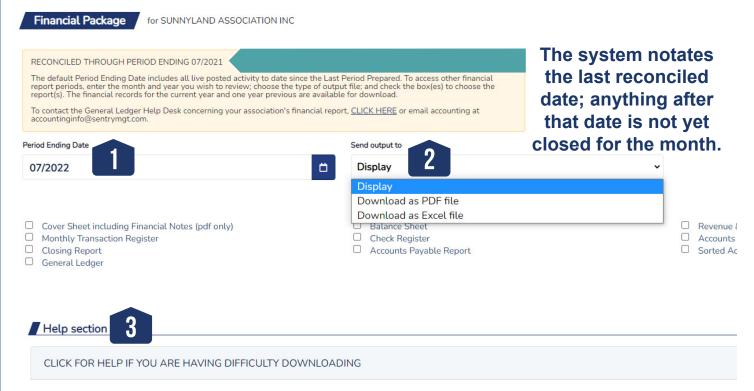
Ledger Card Rules & Regulations * Architectural * Manager Notebook Work Orders Web Admin Tenant notes Homeowner Detail Print Profile Homeowner Search **Homeowner Information** Type SUNNYO SUNNYLAND ASSOCIATION INC SMI Division 000SUNNY00001018 Designated Voter A HOME OWNER 210 MAGNOL City State Zip Code Country ANYWHERE MX 12345 Work Phone Home Phone Cell Phone 111-222-333 222-333-4455 Property Address Resident? Street name 210 MAGNOLIA R No

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.



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 SUNNY0 SUNNYLAND ASSOCIATION INC



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	PREVIEW	DOWNLOAD
Board Evaluation, Board Improvement, Committee Members		
7 Truths for Community Association Board Members	PREVIEW	DOWNLOAD
Board Members, Fiduciaries, Board Tips, Meeting Agenda, Officers Liability Insurance		
Annual Meeting- What is a Proxy?	PREVIEW	DOWNLOAD
Annual Meeting, Special Meeting, Quorum, Proxy Type, Quorum Requirement, Limited Proxy,		
Directed Proxy		
Association Board of Directors: How Am I Responsible?	PREVIEW	DOWNLOAD
Registered Agent, Board Member Roles, Board Member Tips, Board Member Structure		
Association Legal Counsel Who Do They Really Represent?	PREVIEW	DOWNLOAD
Association Counsel, Shareholders, Legal Counsel, Corporate Representatives, Association,	NO. 01-10-10	
Legal		
Association Terminology	PREVIEW	DOWNLOAD
Bylaws, Rules and Regulations, Articles, Charter, Terminology, Quorum, Board Members, Board		

INFORMATION CENTER

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.

Cabinet Ö Association Records mm/dd/yyyy Community Information Ö 07/11/2022 Folder **Governing Documents** Subfolder ALL List by O Date or ○ Description 5 Most recent date first or ○ Oldest date first Description