

CommunityPro® PORTAL – Board Room Navigation Guide

This tutorial is designed to help board members navigate the Board Room 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. To watch a video about the Portal and Board Room, [CLICK HERE.](#)

How is the board room accessed?

Along the left side of the portal site is a tab titled 'Board Room'. Once selected, a drop down of new tab options will appear. The tabs are:

[Property Profile](#)

[Homeowner Profile](#)

[Financial Package](#)

[Board Room Reports](#)

[The Community Builder](#)

[Information Center – Board Only](#)

Click each tab to learn more!



Board members are automatically granted access during the registration process.

Property Profile

Property Detail | Termite Bonds | Insurance Records | CPA Roster | Minutes Log | Mailing Log | Reserve Analysis | Manager Notebook * | Board Of Directors | Work Orders | Web Admin

Property Profile

Print this!

Property Information | General Information | FL Condo | Rules & Regulation | Architectural Control | Amenities | Maintenance | Vendor Information

Property Information			
Association	SUNNY'S SUNNYLAND ASSOCIATION INC		
Address	ANYWHERE FL 12345	Waiver	Yes
Directions	take a left on sunny street		
Community Manager	JOHN SHUNSHINE	Back-up Manager	COLLIN BRUNER
Additional Manager		Division Manager	BRUNER
County	SEMINOLE	Federal ID/Charter	12-3456789 N005236898
Developer Control	N	Turnover Date	04/28/1979
Asin Type	CONDO	Fiscal Year	CALENDAR
Service	ACCT ONLY	Division	01
Contract Date	01/01/0000	Renewal Date	01/01/9999
Mgt Fee Rate	FLAT FEE	Mgt Fee	0 00 0.00
Units Billed	0000 04/10	Total Units	0000 04/10
Residents	17 55%	# of leases	2
Non-residents	14 45%	% leased	6%
Total	31	I.D. (if any)	PR123456
Profile added by	/ /	Last updated by	MMEYER 03/04/21 14:03
General Information			
Type of Housing	Condo	# high-rise, # of stories	N/A
Developer	MGM DEVELOPMENT INC	Date of Incorporation	
Year Community Built	1989		
Manager's site visit schedule	Bi-Monthly		
Board Meeting Date	First Monday/Month	Time	6:30 PM

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

- Property detail** – summary info about the community
- Termite bonds** – summary of bond information
- Insurance records** – summary of insurance policies on file
- CPA roster** – tracking of taxes and CPA reporting
- Minutes log** – tracking of meeting dates
- Mailing log** – tracking of community-wide mailings
- Reserve analysis** – tool to calculate and track reserve funding
- Manager notebook** – notes/ call log entered by Sentry
- Board of Directors** – list of existing board member name, title, term and contact information.

Homeowner Profile

Homeowner Information
(Be sure to scroll to the top or bottom and click on the Save Changes button)

Save changes

Association: SUNNY0 SUNNYLAND ASSOCIATION INC
 Owner AIR #: 000202
 Owner Name: BARONE, RAYMOND & DEBORAH
 Street Address: 210 MAGNOLIA RD Unit # 202
 City State: ANYWHERE MX
 Zip Code: 12345
 Work Phone: 12345
 Home Phone: 555-555-5555
 Cell Phone:
 Property Address: Street # 210, Street name MAGNOLIA RD, Unit # 202
 City State ANYWHERE MX, Zip Code 12345
 LEGAL: Add'l Assn:
 Closing Type: RESALE-DK, Closing Date: 01/01/2012, Closing Update/Label?: 01/10/2012, No
 Collection Activity: AT-02/13, Print?: No, Block Late Letters: Permanent block
 Board ID: SUNNY0, Board member Name: BARONE, RAYMOND, Board Member Position/Title: Director, Term: 1 YEAR, Start Date: 04/01/2021, End Date: 03/31/2022, Date Elected: 07/31/2020, User ID: board1
 Assessments:
 A MONTHLY: 395.00, 00, 375.00
 B SPEC ASSMNT: 1470.00, 00, 00

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

- Homeowner detail** – general info about the homeowner, contact info
- Tenant notes** – tenant info (if applicable)
- Architectural** – tracking status of applications, committee decisions
- Rules & Regs** – violation tracking including picture and status
- Manager notebook** – notes/call log entries by Sentry about this property.
- Ledger Card** – history of charges and payments, current balance
- Work orders** – service orders submitted for this property

Financial Package

SUNNYLAND ASSOCIATION INC
Financial Package

Period Ending Date (mmyyyy): 072020

Send output to:
 Check All
 Uncheck All
 Cover Sheet including Financials
 Balance Sheet
 Revenue & Expense Budget Comparison Report
 Monthly Transaction Register
 Check Register
 Accounts Receivable Report
 Closing Report
 Accounts Payable Report
 Sorted Accounts Payable Purchase Journal
 General Ledger
 Submit

RECONCILED THROUGH PERIOD ENDING 08/2011

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 financial report, [CLICK HERE](#) or email accounting at accountinginfo@sentrymgt.com.

CLICK FOR HELP IF YOU ARE HAVING DIFFICULTY DOWNLOADING
 CLICK FOR A GUIDE TO YOUR ASSOCIATION'S FINANCIAL REPORT

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

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

- 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.

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Board Room Reports

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

Reports for SUNNYU SUNNYLAND ASSOCIATION INC

- Notebooks
 - [Property Notebook](#)
 - [Work Orders](#)
- Accounts Receivable
 - [Accounts Receivable Report](#)
 - [Cash Receipts Summary](#)
- Accounts Payable
 - [Purchase Journal](#)
 - [Detailed Check Register](#)
- General Ledger
 - [General Ledger](#)

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.

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

Community Builder

An archive of educational articles on helpful topics including:

Board Education and Planning

7 Truths for Community Association Board Members <i>Board Members, Fiduciaries, Board Tips, Meeting Agenda, Officers Liability Insurance</i>	PREVIEW	DOWNLOAD
Annual Meeting- What is a Proxy? <i>Annual Meeting, Special Meeting, Quorum, Proxy Type, Quorum Requirement, Limited Proxy, Directed Proxy</i>	PREVIEW	DOWNLOAD
Association Board of Directors: How Am I Responsible? <i>Registered Agent, Board Member Roles, Board Member Tips, Board Member Structure</i>	PREVIEW	DOWNLOAD
Association Legal Counsel... Who Do They Really Represent? <i>Association Counsel, Shareholders, Legal Counsel, Corporate Representatives, Association, Legal</i>	PREVIEW	DOWNLOAD
Association Terminology <i>Bylaws, Rules and Regulations, Articles, Charter, Terminology, Quorum, Board Members, Board</i>	PREVIEW	DOWNLOAD

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

Information Center

This feature provides storage for important association documents.

The screenshot shows the 'Information Center' search interface. It includes a search bar and several filter options: 'Cabinet' (set to 'Association Records'), 'Drawer' (set to 'Board Access (Board only)'), 'Folder' (set to 'ALL'), and 'Dates' (From: empty, To: 05/26/2021). Below these are options for 'List by' (Date or Description) and 'Sort by' (Most recent date first or Oldest date first). A 'Search/ Open' button is at the bottom.

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 set 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** allows users to narrow down their search by date or key words.