

OWNER PORTALS

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Created 1.25.2021

IDENTIFYING BOARD MEMBERS

<https://vantaca.zendesk.com/hc/en-us/articles/360012099592-How-to-Add-Board-and-Committee-Members>

In order for specific people to have access to the Board sections of the portal we must add these owners as Board members in Vantaca. Update this list after every annual meeting and as needed.

1. Select the correct Association. Then navigate to Association > Board/Committee
2. Select the Board/Committee tab. Current Board and Committee members will be listed.
3. Click on the +Assign New Board/Committee Member button to begin adding a new user.

The screenshot shows the Vantaca interface for the 999) Presidential Valley association. The 'Board/Committee' tab is active. A dropdown menu is open, showing various options, with 'Board/Committee' highlighted. A table lists current members with roles and types. A red arrow points to the '+ Assign New Board/Committee Member' button.

Role	Type
ARC Approver	ARC Committee
Board	President
Board	Treasurer
Board	Vice President
z-ARC Committee	ARC Committee

4. Select the User from the drop down the menu to see a current list of logins for the Association. The owners are listed alphabetically by first name.
5. Select the Role of Board. For Type, choose their position on the board or 'Board Member'
6. Select the Start and End Date (if known). The Start Date will always default to the current date. The Start Date is necessary but the End Date is not.

*****Do not edit any other fields on this screen!*****

The screenshot shows the 'Edit Board Member' form. The fields are filled with the following information:

- User: Abraham Lincoln / abraham@formerprez.com
- Role: Board
- Type: President
- Start Date: 1/25/2021
- End Date: (empty)
- User Name: Abraham Lincoln
- Password: (empty)
- Email: abraham@formerprez.com
- Phone: (444) 444-4444
- Address1: 1861 Pennsylvania Ave
- City: Washington, Dc 20500

The 'Update' button is highlighted with a red arrow.

7. Update to Save this entry. Repeat the process to add other Board Members.

MIMIC AN OWNER VIEW

Use this feature to see what the portal looks like to an owner or Board member.

- Select the Homeowner from the Homeowner List
- Navigate to **Homeowner > Logins** from the menu
- Select the Mimic button next to the relevant owner

The screenshot shows the Vantaca interface for Homeowners > Logins. The page title is "Logins - 99910009 - John Quincy Adams & Louisa Catherine Presidential Valley". The main content area displays a table of logins with columns for User Name and eMail. The first row is for John Quincy Adams with email johnquincy@formerprez.com. The second row is for John Adams with email johnquincy@formerprez.com. A red arrow points to the "Mimic" button next to John Quincy Adams. The "Logins" menu item is highlighted in the top navigation bar.

User Name	eMail
John Quincy Adams	johnquincy@formerprez.com
John Adams	johnquincy@formerprez.com

REGISTRATION HELP

Owners will receive their login information by one of several methods:

1. When the portal is first opened every owner we have a Primary email address for will receive a registration email. Letters will be mailed to owners we don't have emails for.
2. When new owners purchase a unit, the registration email will be sent by GHCM's Resale Dept. as part of the Ownership Transfer process.
3. Owners can visit the portal login page-portal.ghacm.com-and click on the Sign Up button.
 - In order to register, the owner will need their Portal Key.
 - If they don't have a Portal Key, they can fill out the rest of the information and use the "I do not have a valid key" link, and their request will be sent to a portal administrator.
 - The owner will receive an email response.

****The Portal Key can be found on the Owner's screen under Homeowners > Logins****

The screenshot shows the Vantaca interface for Homeowners > Logins. The page title is "Logins - 99910009 - John Quincy Adams & Louisa Catherine Presidential Valley". The main content area displays a table of logins with columns for User Name and eMail. The first row is for John Quincy Adams with email johnquincy@formerprez.com. The second row is for John Adams with email johnquincy@formerprez.com. A red arrow points to the "Portal Key: 70024A9414DD" field. The "Logins" menu item is highlighted in the top navigation bar.

User Name	eMail
John Quincy Adams	johnquincy@formerprez.com
John Adams	johnquincy@formerprez.com

PASSWORD HELP

<https://vantaca.zendesk.com/hc/en-us/articles/360050033551-Modern-Portal-Resetting-a-Homeowner-s-Portal-Password>

After registering, owners can reset their password themselves on the portal login page.

If instead, they ask for your help:

- Select the Homeowner from the Homeowner List
- Navigate to **Homeowner > Logins** from the menu
- Click on **Reset Password**, which will send the homeowner an Email with a temporary password and instructions on how to change their password on the Portal

OR

You can reset the password from this screen by clicking on the Edit button:

- A pop up window will appear with their login information with a blank password field (the password does not show for security purposes)
- Now enter the new desired password into the blank password field and click on **Update**
 - Our default password is GHCM123
- This new password will override their current password
- This does not automatically email the owner the password you entered. You will need to contact the owner to inform them of their new password.

The screenshot shows the Vantaca interface for managing homeowner logins. The 'Homeowners' menu is open, and the 'Logins' option is selected. The main content area displays a table of logins for the property '99910009 - John Quincy Adams & Louisa Catherine Adams, Presidential Valley'. The table includes columns for 'User Name' and 'eMail'. There are three rows of logins, each with an 'Edit' button (marked with a red 'a'), a 'Mimic' button, and a 'Reset Password' button (marked with a red '1').

User Name	eMail
John Quincy Adams	johnquincy@formerprez.com
John Adams	johnquincy@formerprez.com
test	johnquincy@formerprez.com

HOMEOWNER REQUEST ACTION ITEMS

Owners are encouraged to submit all non-emergency communication through the portal. This will allow employees to communicate with the owners while creating a record in Vantaca. The intention is to get this information out of email and into Vantaca so other employees/new managers can easily find this information.

Owners will have the option to select from 4 request types:

- Billing Question
- Fee Waiver Request
- General Question
- Homeowner Refund Request