

New and Improved EJF Board Portal

We will review and discuss the following:

Look for the **Eye** to dig deeper and see more information

Customize the opening page with a picture

-Boards may customize this picture -add different picture to each page?

BEST PRACTICE: submit the picture to amanda.diaz@ejfrealestate.com and please note the following in the subject line of the e-mail: "Name of the community" portal picture request

New and Improved sign-up process

Old method:

EJF sends new owners their account number

Owner goes to portal and signs-up

Information sent to EJF

EJF "confirms" the owner information and creates a log-in

Owner receives log-in information via email and can enter the portal

Password was account number

New and improved method (AMANDA will have PDF for PORTAL sign up)

EJF sends new owners registration key and account number

Owner goes to the portal and signs up (including registration key)

Owner has access to portal

Owner can choose their own password

New and Improved Dashboard

New look-more visually pleasing, easier to find information, and enhanced offerings

Can customize globally and per building

-all properties will be switched on April ??, 2021

-can add one Additional Information page

-add the top ten list for your community or most important phone numbers, etc. ENDLESS POSSIBILITIES

BEST PRACTICE: send email to amanda.diaz@ejfrealestate.com with subject line: Portal Additional Information Page; send info in Word format or in the body of the email

-customize the Dashboard Page written information

-make it how you want

BEST PRACTICE: send email to amanda.diaz@ejfrealestate.com with subject line: Portal Dashboard Page Info; send info in Word format or in the body of the email)

Calendars

-create amenity calendars

-create processes such as reserving common rooms, move ins/outs, etc.

-review community calendar

-owners can attach forms, photos, etc. to their requests

-time parameters can be set for action types (i.e. move in only from 9-5)

BEST PRACTICE: send email to amanda.diaz@ejfrealestate.com with subject line: Amenity Requests for Portal; send info in Word format or in the body of the email and include all parameters!

-go to month view and double left click to create an event; can assign a security level to the event (to determine who can view the event)

-Board members can add events and choose who sees the info

New: Two Places to Submit a Request

- "Submit a Request" now at the bottom of the dashboard page

-Under My Items, the Submit a Request button is at the top and can search by type

New Directory Functions

- Break out of Board and Committee lists (see buttons at top)
- New search feature!

New: Updated Documents Folder Capabilities

- Search all documents with the new search bar in the upper right corner
- Now search all documents by name
- Search shows the documents and also the path where the form is located
- “Clear Search” brings you back to the main Documents folder

My Contact Info

- Easier to change password
- Shows more of your data (and can edit directly)
- Can change the primary contact’s e-mail or phone number
- Enter in additional contact info (new partner, management company, etc.)

Board Action Items

Collections

- New search capabilities-name, owner, type, step, etc.
- Hit the Eye to see more info
- Send an email directly from the system
- Add new columns for more information
- Save your report for future use

Homeowners

- Search feature allows for quicker look up
- Add new columns for more information
- Save your report for future use

Payment of Condo Fees

- Easier to read
- Sign up for ACH online!! Now paperless!
- New language at the bottom is a new security feature; the permission applies to whatever the owner is requesting (one-time or recurring)

Financial

- Bank Account-now check out the balances! Check out the register!
- More Reports available—live and up-to-date!
 - Statement of Revenue and Expenses
 - Balance Sheet
 - Accounts Receivable
 - Accounts Payable
 - General Ledger Expenses Only
 - General Ledger
- Invoice Research-search by vendor! Pull up invoices on the spot! See invoice history (click on eyeball)

Collections

- See the steps (click on the Eye)
- Run reports by status type (Delinquency Notice, Friendly Reminder, etc.)
- See actual letters sent to owners