

NAVIGATING THE CLIENT PORTAL



To view owner accounts and ledgers:

1. Select the Association you would like to view.
2. Select the owner account to view.
3. To view the ledger summary, from the ledger tab scroll down to ledger view and select view additional ledgers, then select summary from the dropdown box.

To print the ledger summary:

1. Select the print ledger tab. The ledger will open in another window.
2. Then select the print icon at the top left corner.
3. Select export from the pop-up box and select the open tab. The ledger will generate in PDF format and then print or save.

To view letters:

1. Select the Letter tab.
2. Select the letter to view.
3. The letter will open in another window.

To view and print reports:

1. Select the Report tab on left side of screen.
2. Select report to view or print.
3. Apply report filters. Under Operator select the equal sign (=) for both Management Company and Association. Under Value select Management Company and Association to view report. See below for example.

Account Detail

CLEAR VIEW

Selection	Operator	Value
Management Company	=	all
Association	=	all

OR

Client Case Status

CLEAR VIEW

Selection	Operator	Value
Management Company	=	all
Association	=	all
Active	=	all

1. Select View in right corner and report will generate.
2. To print report, select the printer icon in left corner then select export from pop-up box.
3. Select Open at the bottom from pop-up box.
4. PDF will appear on the bottom of screen, open PDF and print or save.