# Client Contact Guide to Caliber Portal

*(Revised: Feb-18)*

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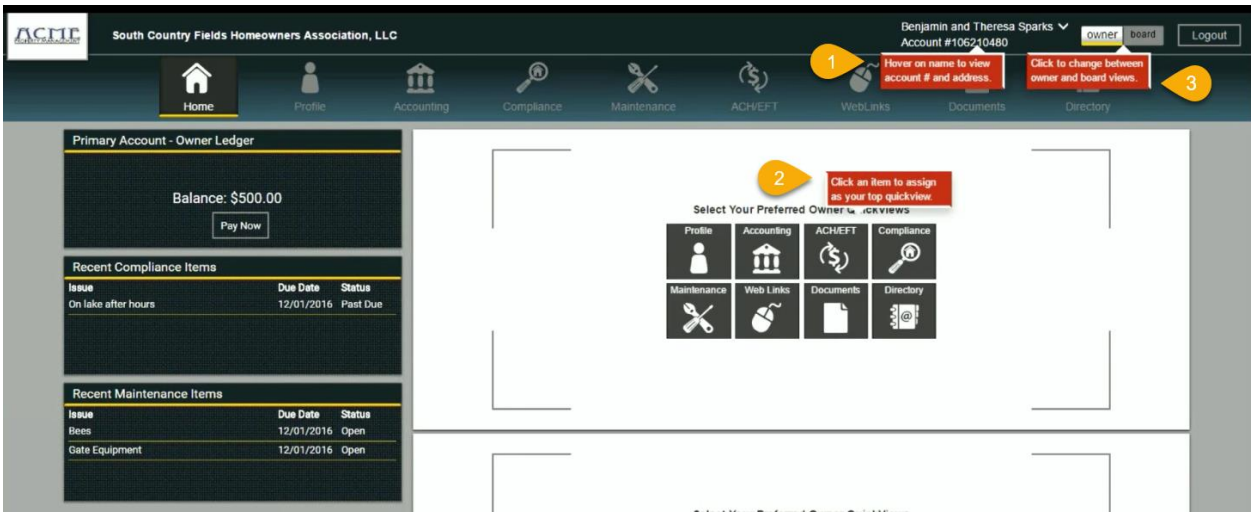
## Introduction

This document will provide detail on Client Contacts functions only. Please keep in mind these features are available at your Management Company's discretion.

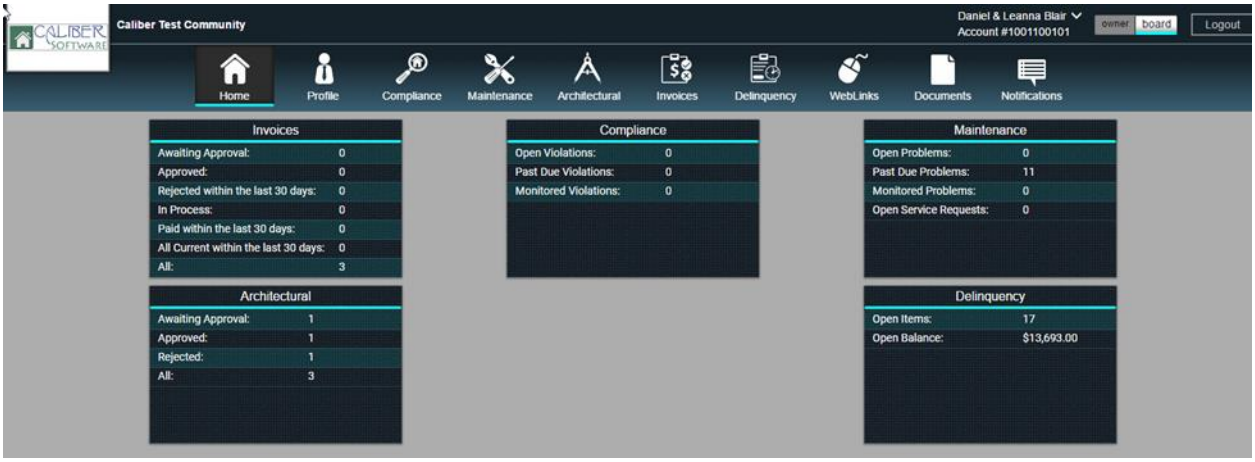
## Home

After registration has been completed, enter username and password to log in. Once logged in, there will be three red boxes in the upper right hand corner. These are here to guide the user when first logging into Caliber Portal.

1. Hover cursor over account name to view Account Number and Address.
2. Click on an item to assign it as your top Quickview (details gone over in Homeowners Guide).
3. Click to change between Owner and Board View. Owners are represented in yellow, while the Board is shown in blue. This gives the user the ability to toggle back and forth.



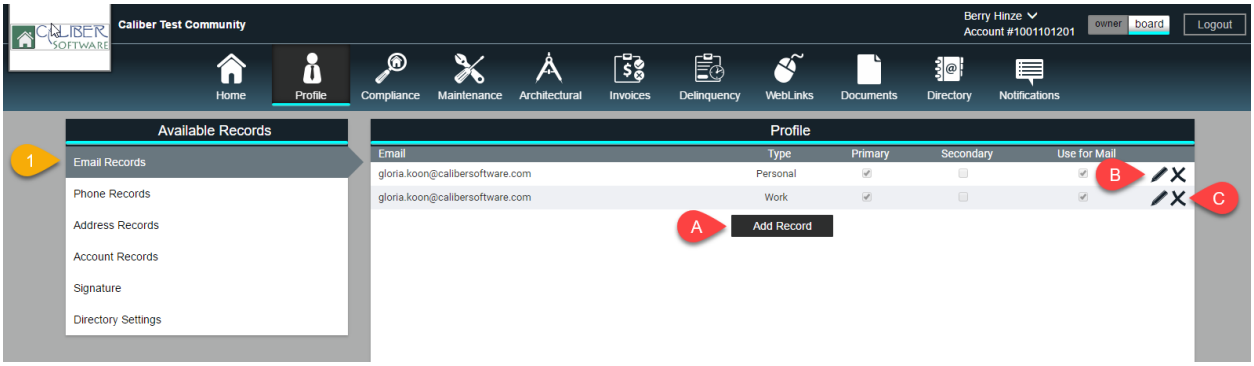

Once the user has toggled over to the Board side. They will notice the highlight color change, as well as the view. On the Board side the user will have tiles on their Home screen, as well as a full Icon menu across the top. Clicking on any one of these tiles or icons will take the user to that specific area. The tiles and icons will show in accordance with the Management Company's setup.



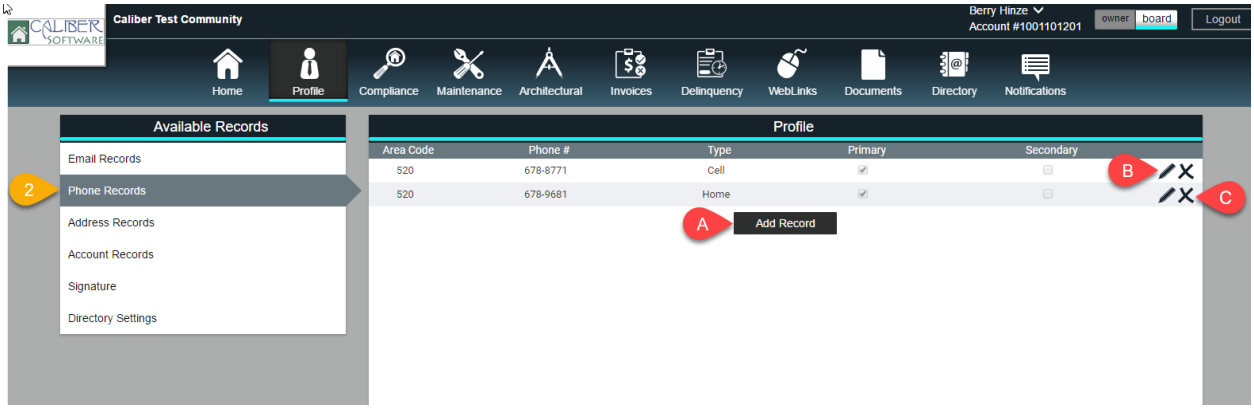
## Profile

The user will be able to view and edit their profile or contact information.

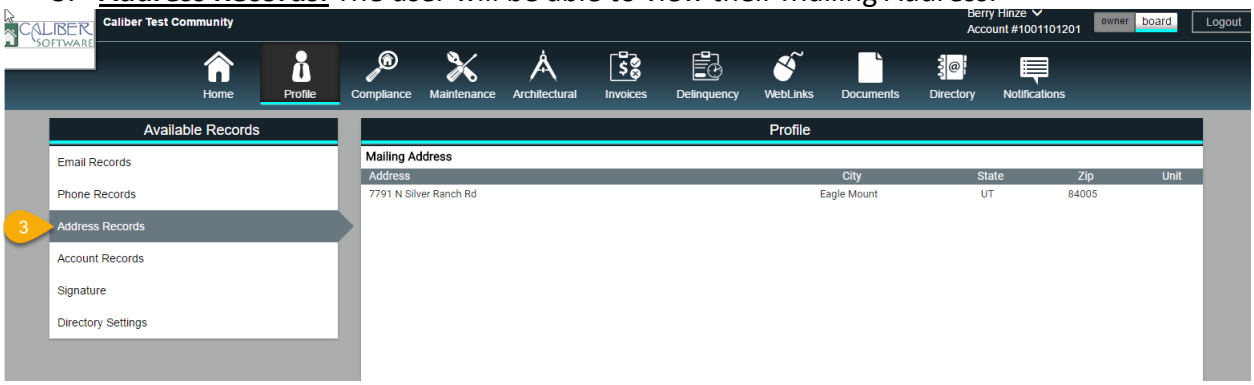
1. **Email Records**
   A. Add Record
   B. Edit Record
   C. Delete Record



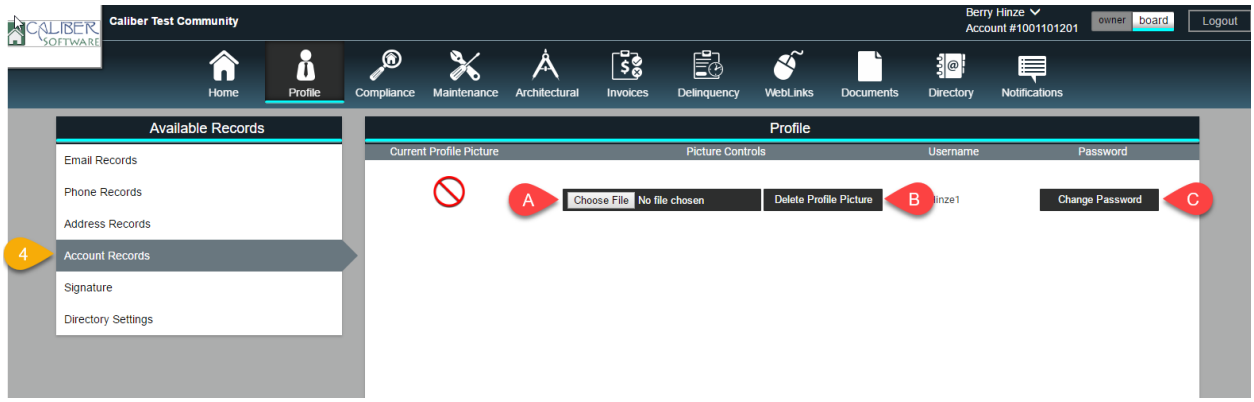

2. **Phone Records**
   A. Add Record
   B. Edit Record
   C. Delete Record



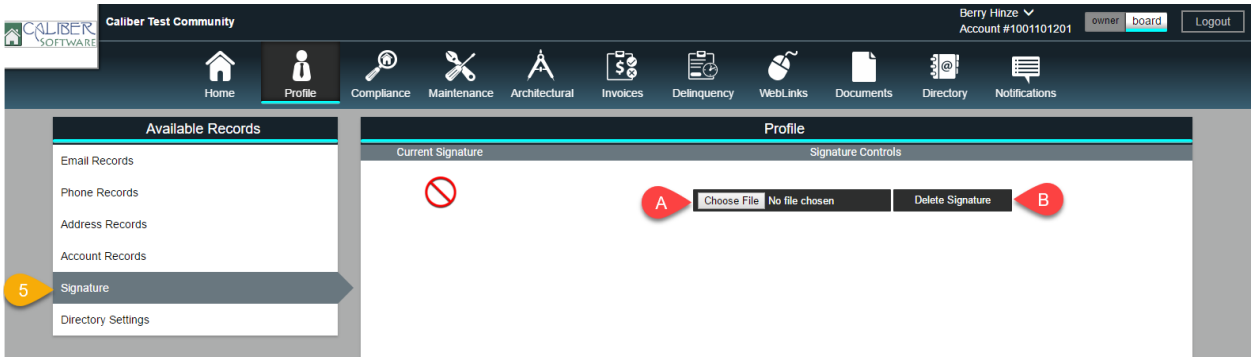

3. **Address Records:** The user will be able to view their Mailing Address.



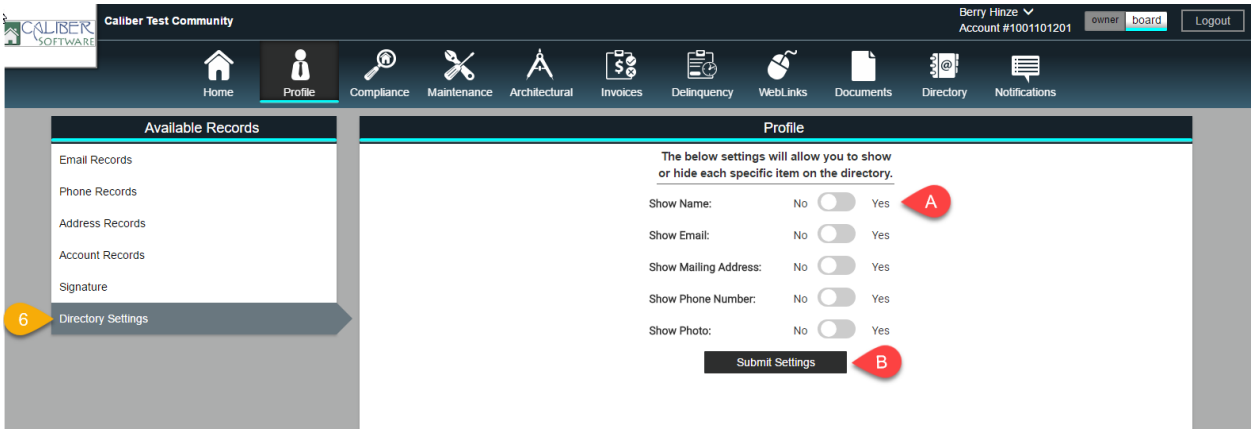
4. **Account Records**
   A. **Choose File** to upload a Profile Picture
   B. **Delete** Profile Picture
   C. **Change** Caliber Portal Password




5. **Signature:** The user will be able to upload a digital signature if he or she is an Authorized Board Signer.
   A. **Choose File** to upload digital signature
   B. **Delete** digital signature



6. **Directory Settings**
   A. Choose to Hide or Show by toggling from No to Yes
   **B. Submit Settings** to save

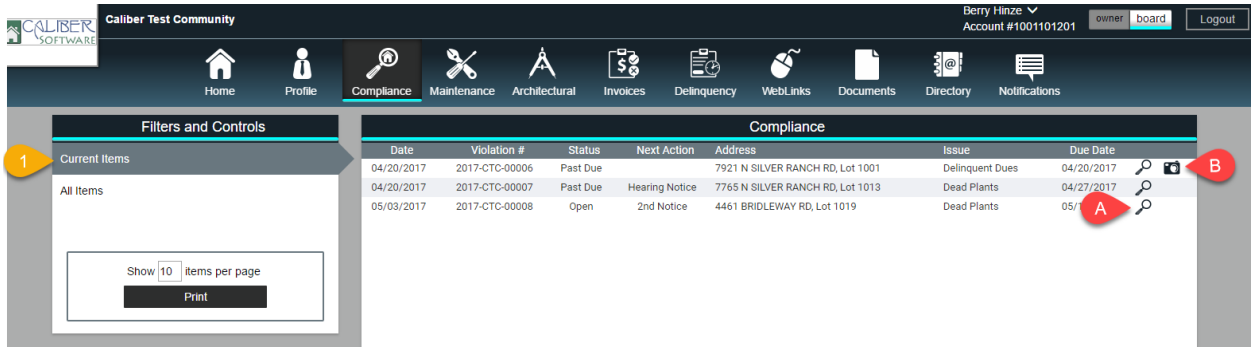



## Compliance

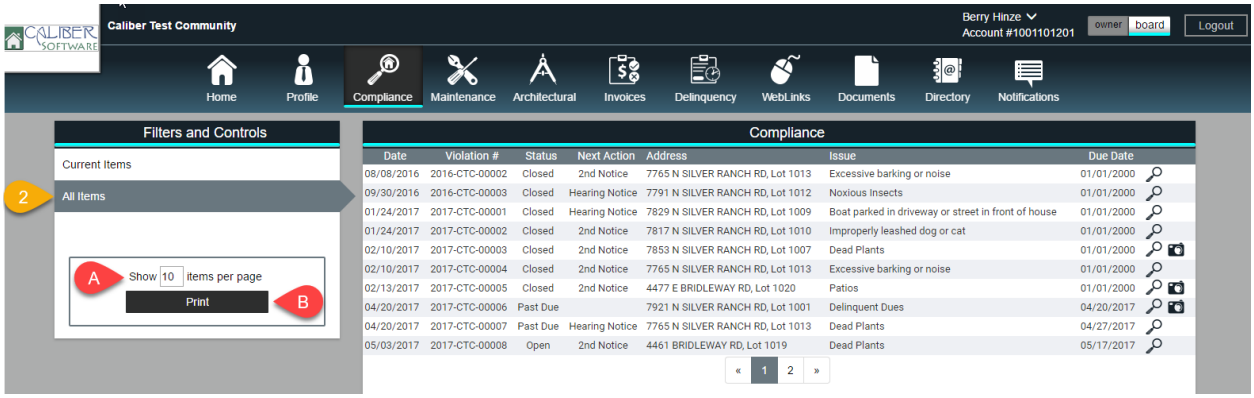
The Client Contact will be able to view any Compliance issues for their Community.

## Filters and Controls

1. **Current Items**
   A. **Magnifying Glass** Icon displays Violation Details.
   B. **Camera** Icon displays pictures attached to that Compliance issue.



2. **All Items**
   A. Adjust how many items are displayed per page.
   B. Print Compliance History

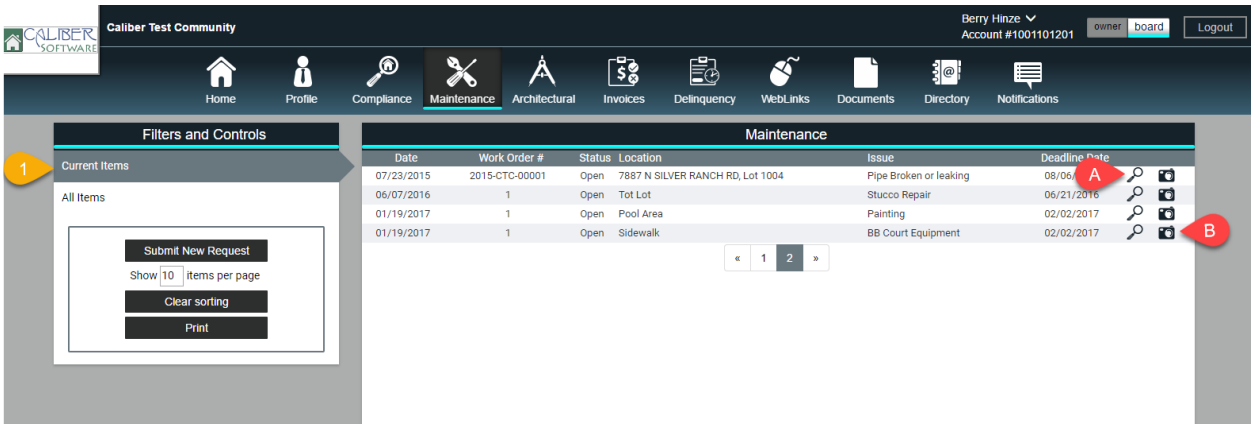



## Maintenance

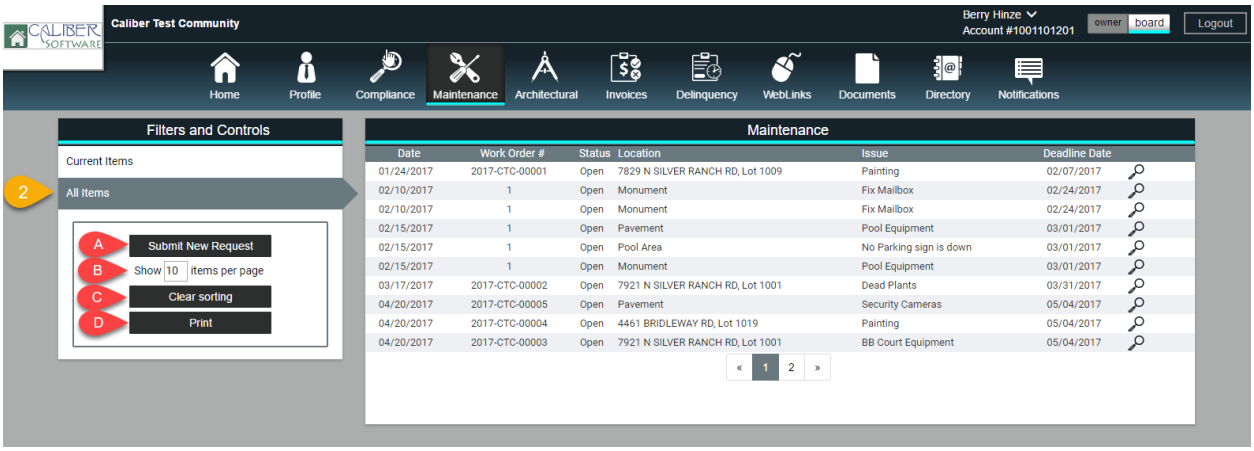
Within Maintenance, the user will be able to view Maintenance items and Service Requests for the Community, as well as submit new Service Requests.

## Filters and Controls

1. **Current** Items
   A. **Magnifying Glass** Icon displays Maintenance Details
   B. **Camera** icon displays pictures attached to that Maintenance issue.



2. **All Items**
   A. Submit **New Service Request**
   B. Adjust how many items are displayed per page
   C. Clear Sorting
   D. Print Maintenance history

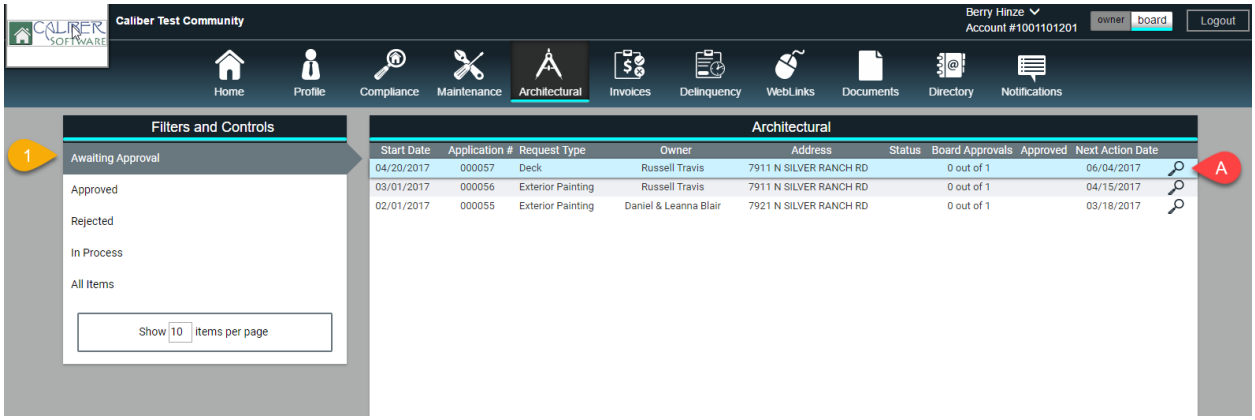



## Architectural

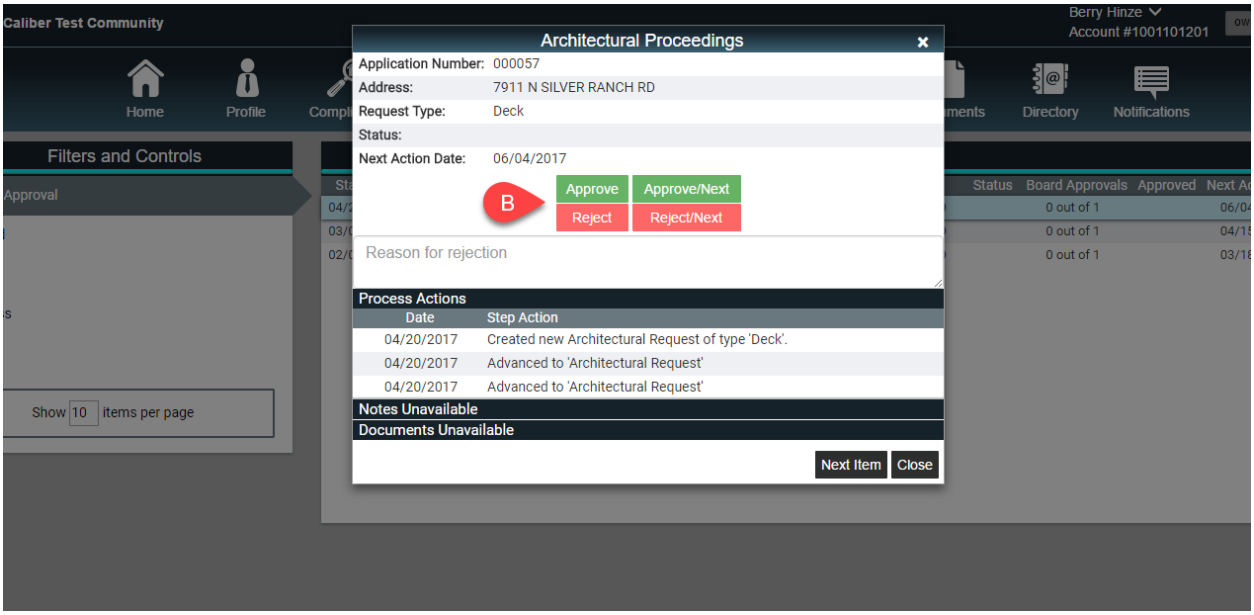
Within Architectural, the user will be able to Approve, Reject, and View Architectural items for the Community.

## Filters and Controls

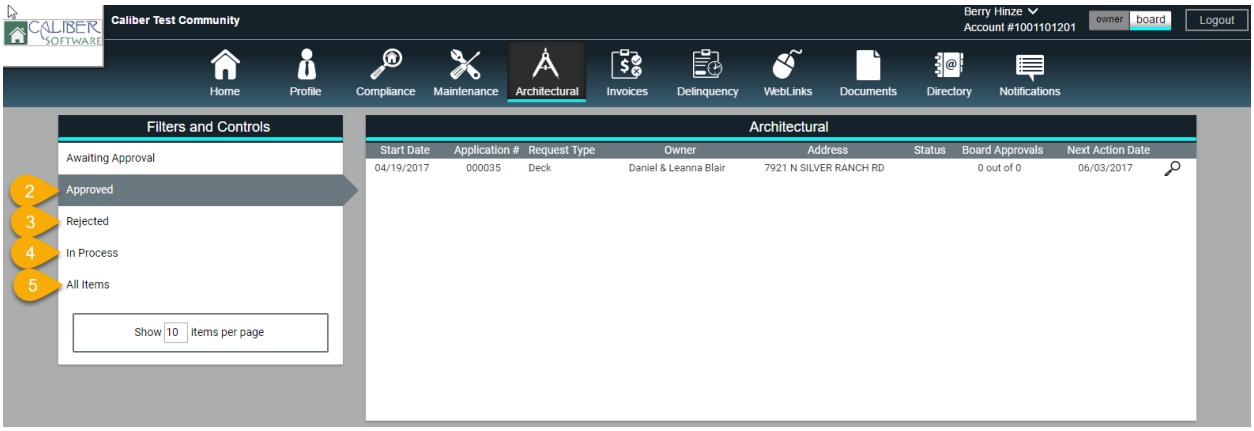
1. **Awaiting Approval**
   A. **Magnifying glass** icon displays Architectural Item details



B. **Approve** or **Reject** item




2. **Approved** items
3. **Rejected** items
4. **In Process** items
5. **All Items**

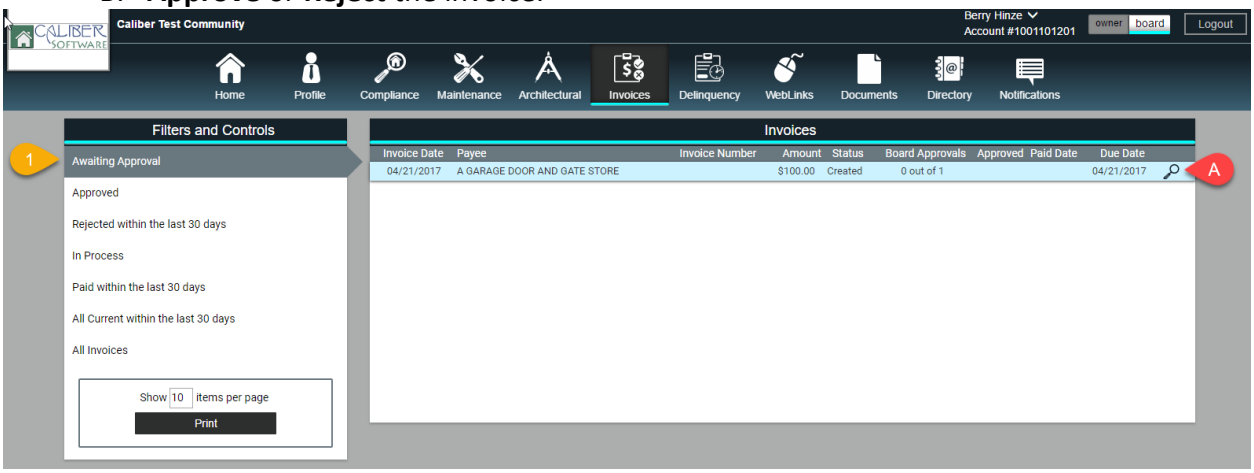


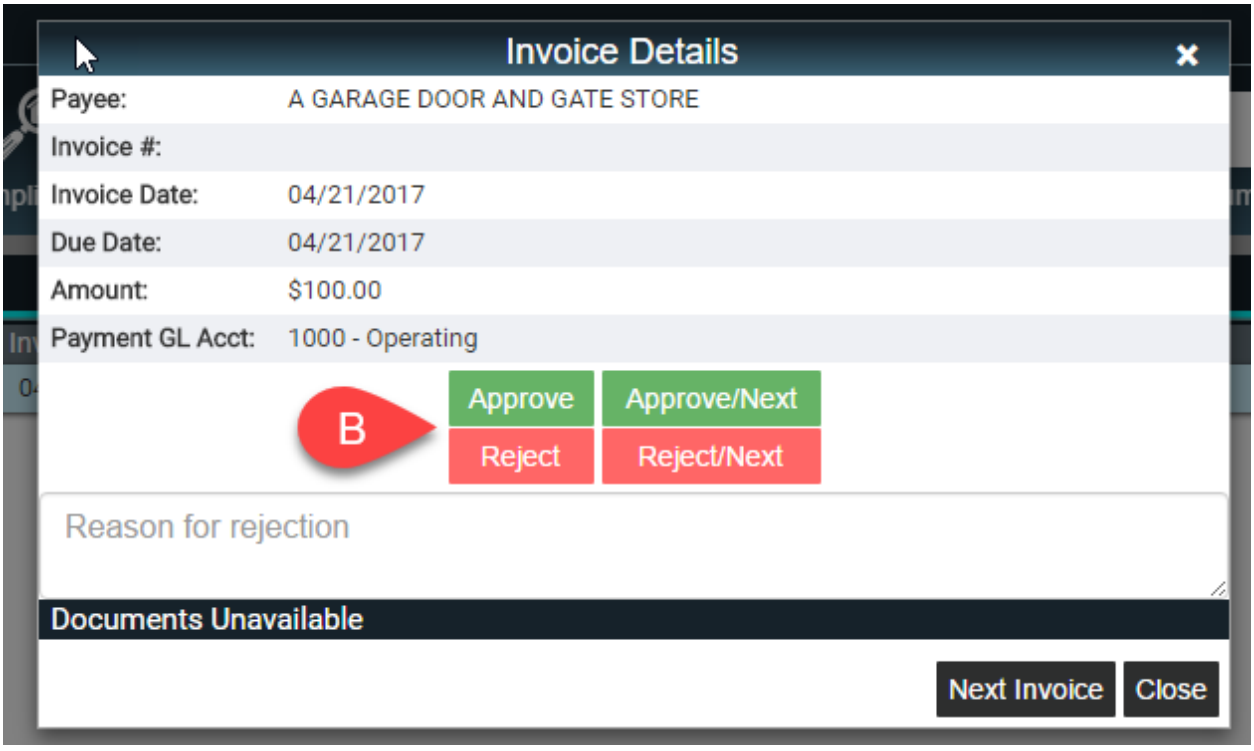
## Invoices

Within Invoices, the user will be able to Approve, Reject, and View invoices for the Community.

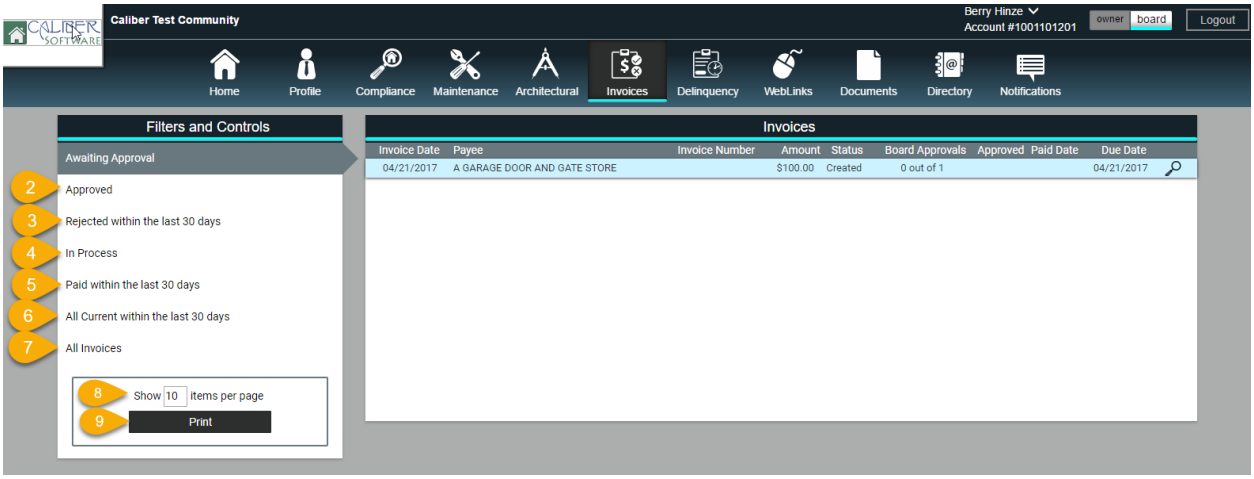
### Filters and Controls

1. **Awaiting Approval**
   A. **Magnifying glass** icon will display the invoice details.
   B. **Approve** or **Reject** the invoice.



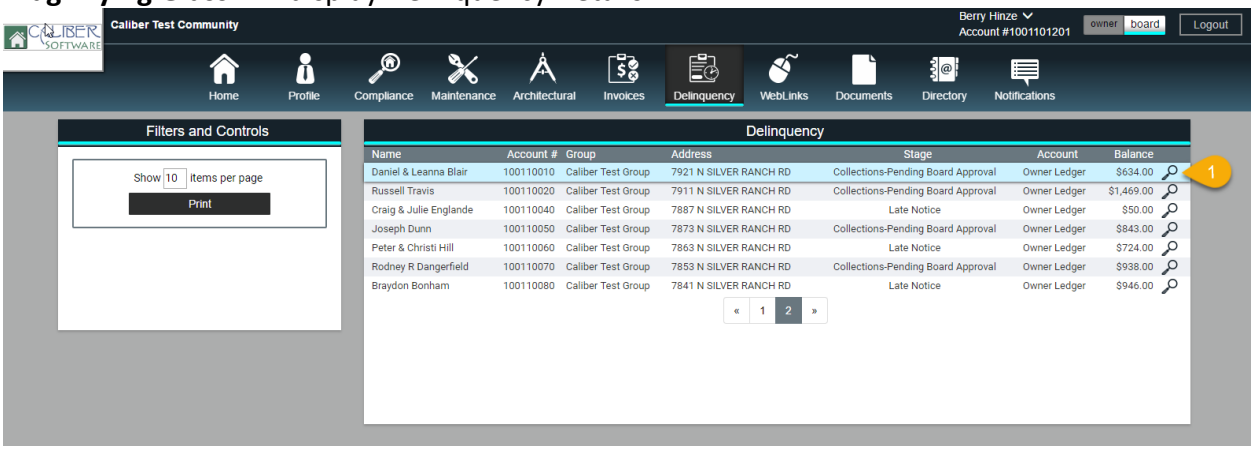
2. **Approved**
3. **Rejected**
4. **In Process**
5. **Paid**
6. **All Current**
7. **All Invoices**
8. Adjust how many items are shown per page
9. **Print**



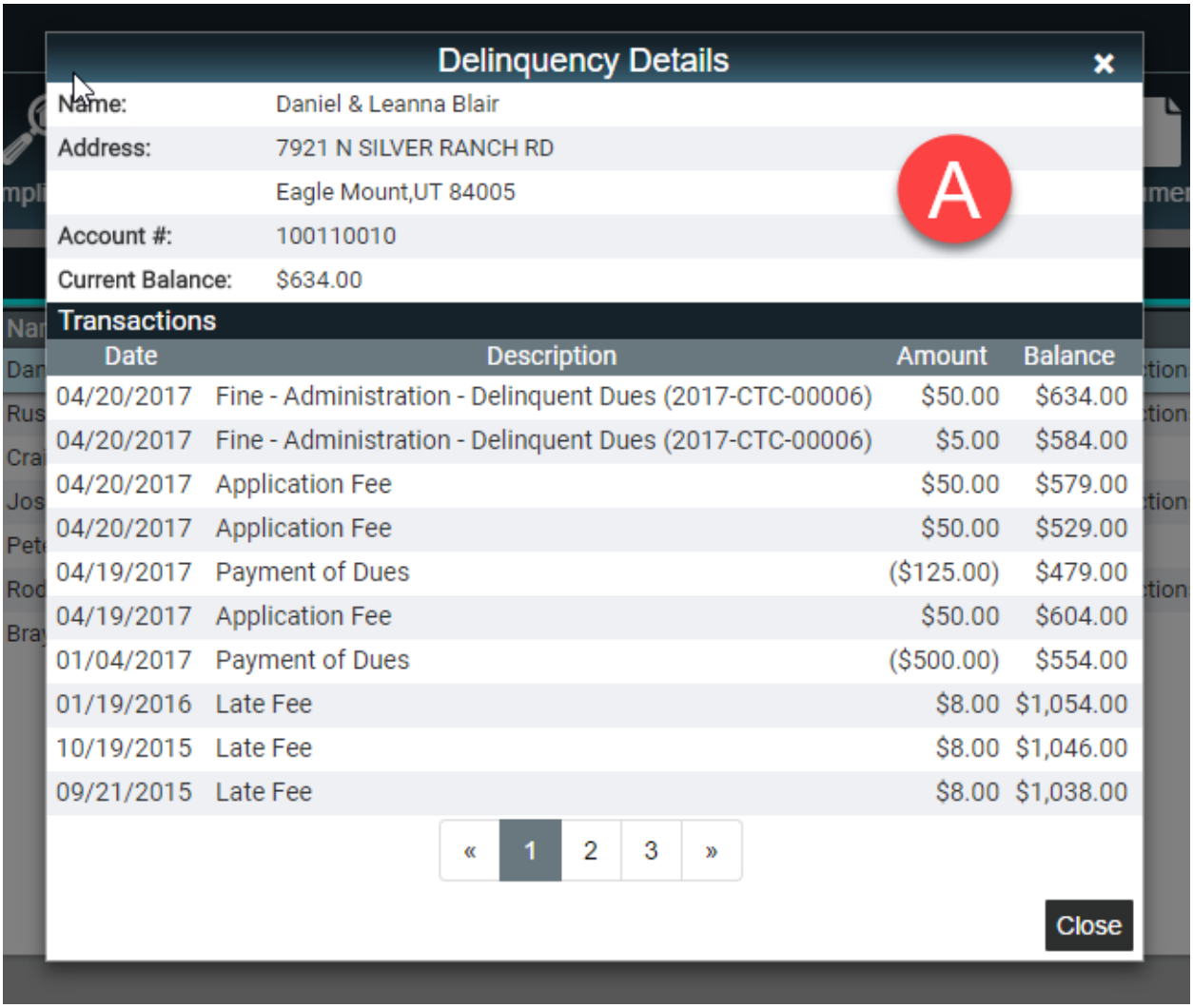

## Delinquency

Within Delinquency, users will be able to view a list of who is in a Caliber Delinquency Process. This includes the transaction account and the current Delinquency Stage.

1. **Magnifying Glass** will display Delinquency Details



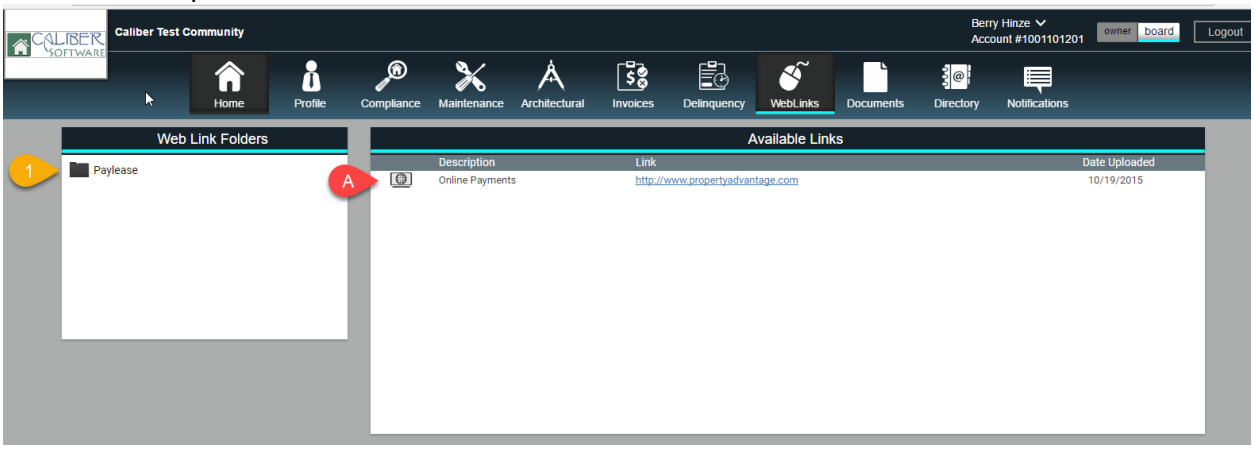
A. Delinquency Details



## Web Links

Users will be able to view any helpful links provided by the Management Company.

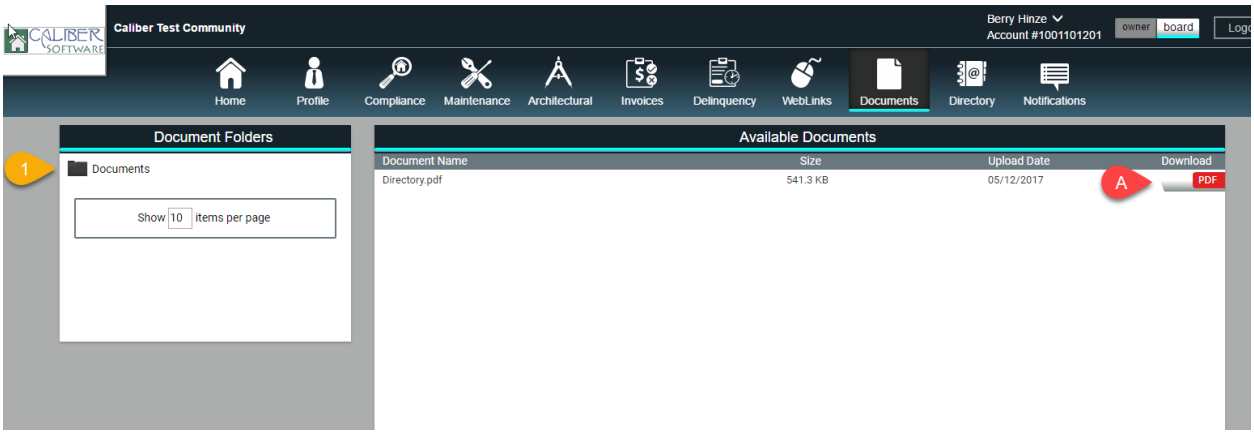
1. Click on a Folder to view links within
   A. Helpful link




## Documents

Users will be given the ability to view documents set up within folders that are provided by the Management Company.

1. Click on a Folder to view Documents within
   A. View Document

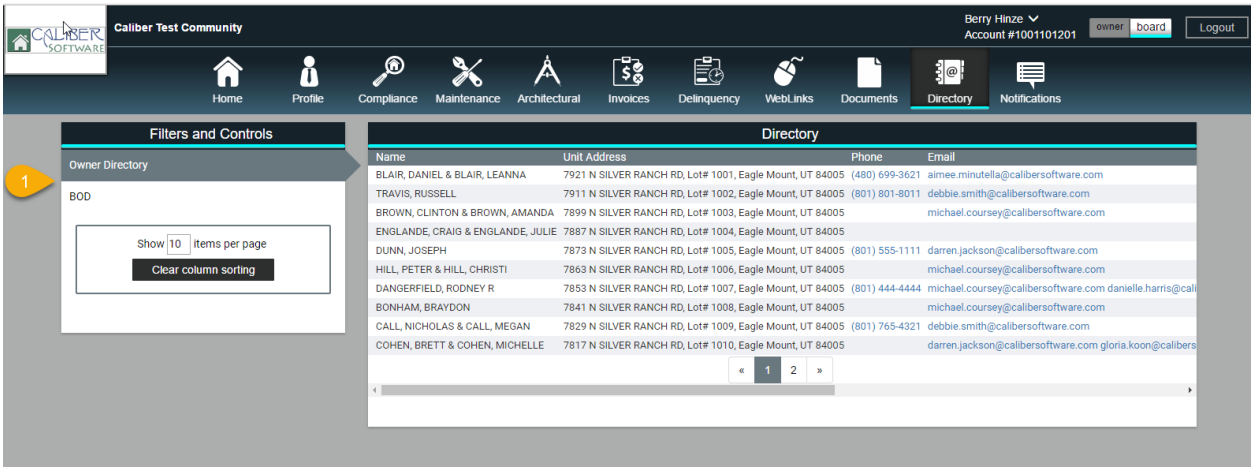


## Directory

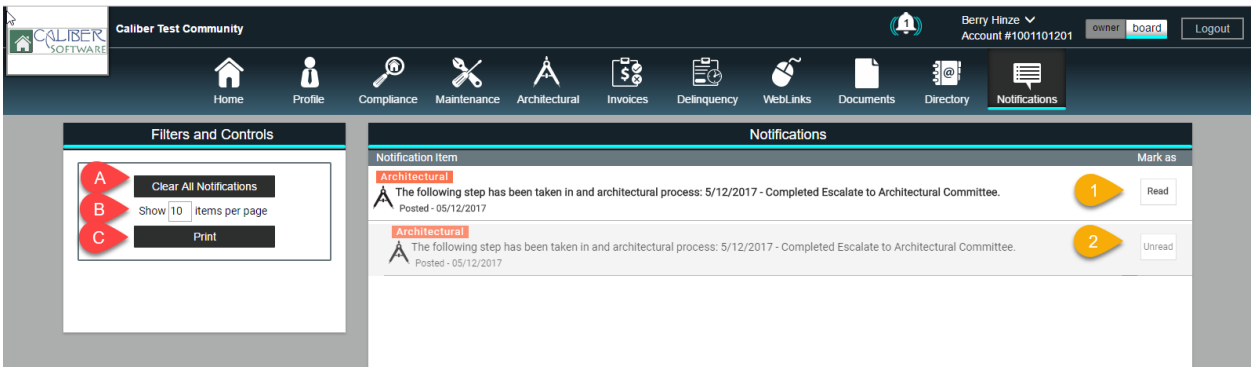
This is where the user will be able to view the Client Contact and Owner Directory based on the Management Company set up.

**Filters and Controls:**

1. Select a Directory to view




## Notifications

Notifications will only be available to Client Contacts that are members of an Architectural Committee.

1. Mark as Read
2. Mark as Unread
   A. Clear Notifications
   B. Select number of items to display
   C. Print