CALIBER SOFTWARE

Official Training Guide
January 2020

Caliber Portal and FRONTSTEPS Pay
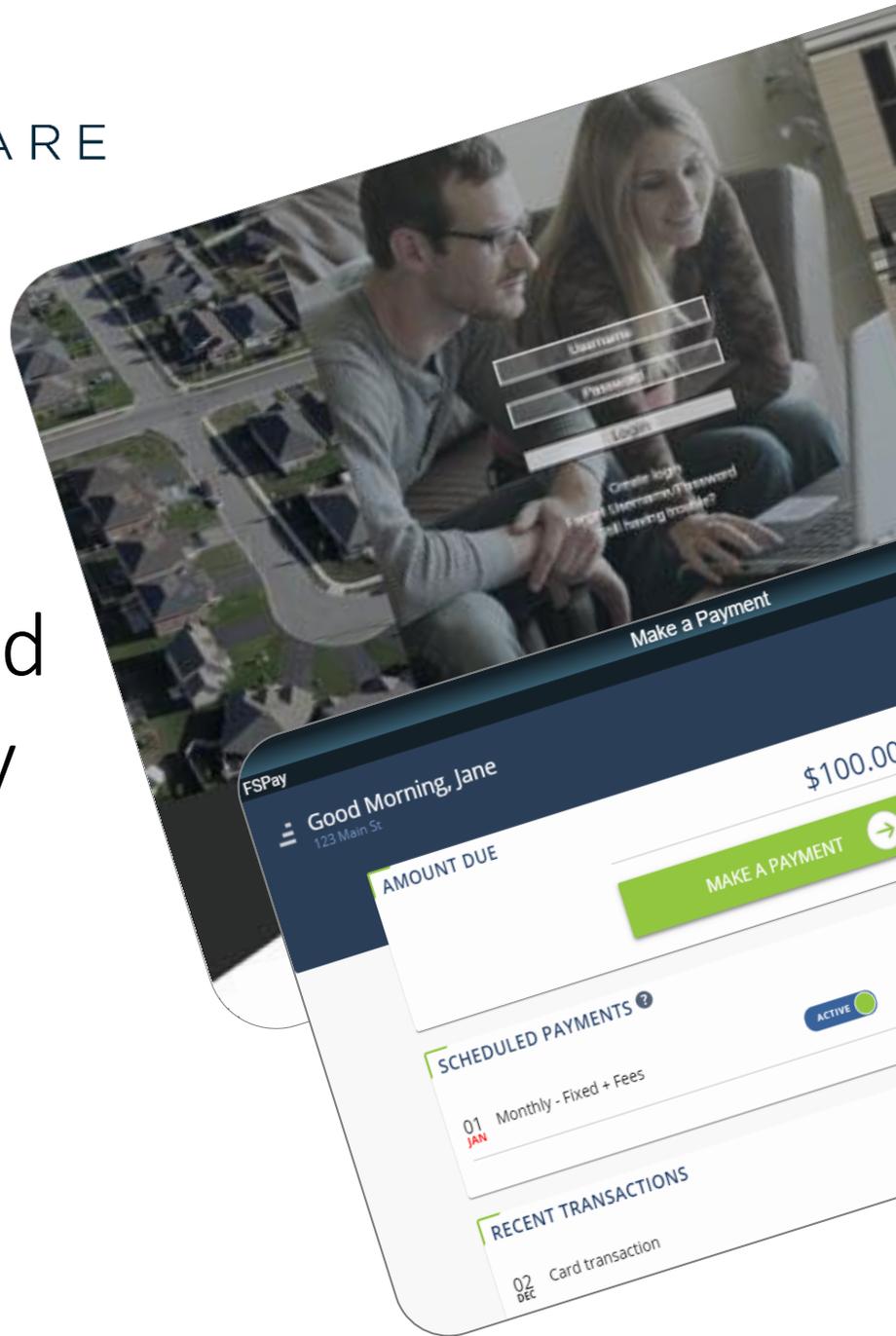
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◉ Introduction

Getting Started with Caliber Portal and FRONTSTEPS Pay

FRONTSTEPS Payments (FSPay) is our brand-new payments platform built specifically to meet the needs of Caliber customers, including automatically posting online payments to homeowner ledgers, simplified recurring payments (AutoPay), and a single-login user experience.
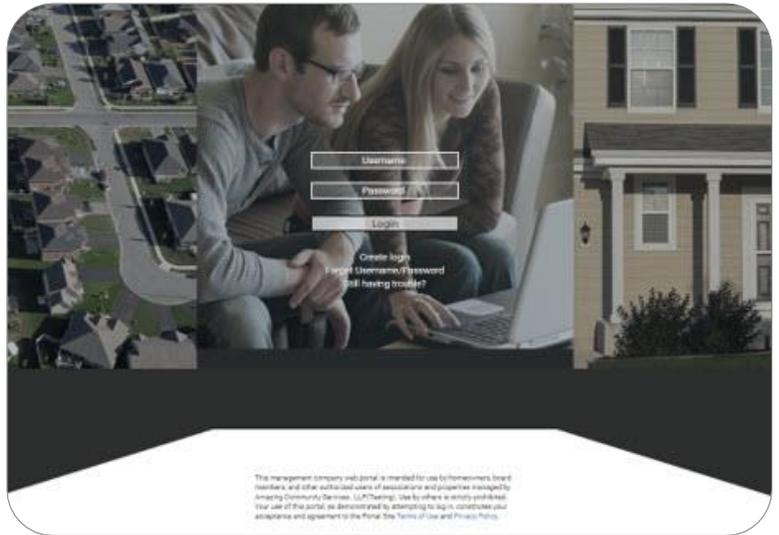
CALIBER PORTAL LOGIN

FSPay opens in the Caliber Portal when a resident clicks Make a Payment. Residents can then make a one-time payment, schedule payments, and view transaction history.

Residents can login to Caliber portal and make a payment using FSPay from any device with an internet connection – a computer, tablet, or smart phone!
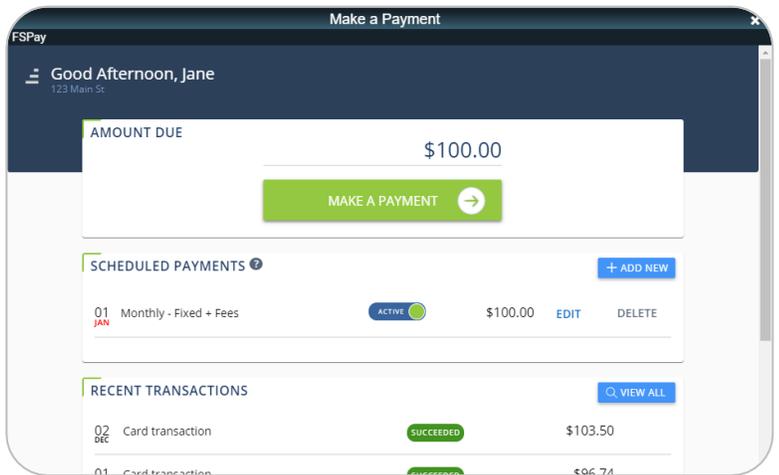
PAYMENTS DASHBOARD

Registering for Caliber Portal

If this is the resident's first time accessing Caliber Portal, they must first register their account. After registering their account and logging in, they will be able to make a payment using FRONTSTEPS Pay.

> ❗ The resident must have each of the required items below to register their account on Caliber Portal.
> If they do not know what these items are, they must contact their Management Company for assistance before they can continue.

Required Items:

- **Internet Connection**
- **URL Link to their community portal, aka Caliber Portal** (provided by their Management Company)
- **Account Number** (provided by their Management Company)
- **Email Address** (ability to login to their email account to retrieve email messages)
- **Address**
- **Unit Number**

Create a Login

1. Navigate to your **community portal** in any internet browser.
2. Click **Create Login**.
3. Enter your **Account Number** (provided by their Management Company).
4. Enter your **Email** address.
5. Click **Submit Registration**.

    If the email address you entered is not currently on file with your Management Company, you will be prompted to enter your **Address** and **Unit Number** that is associated with your account.

6. Click **Submit Registration** again.
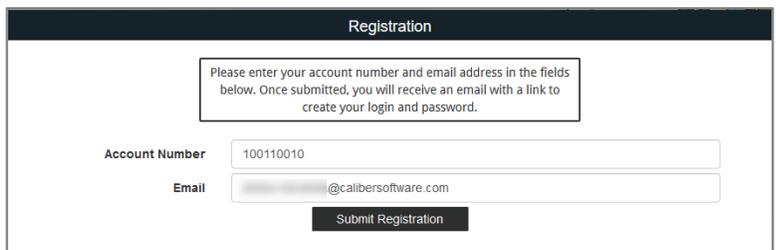
7. If there is more than one **Owner** on the account, a drop down will appear allowing you to select the appropriate resident.
8. A confirmation message will appear stating, **"Registration Successful! You will receive an email containing a link to create your login and password shortly."**
9. Navigate to your Email Inbox.
10. Open the email from *alert@calibersoftware.email* and click on the link to complete your registration.
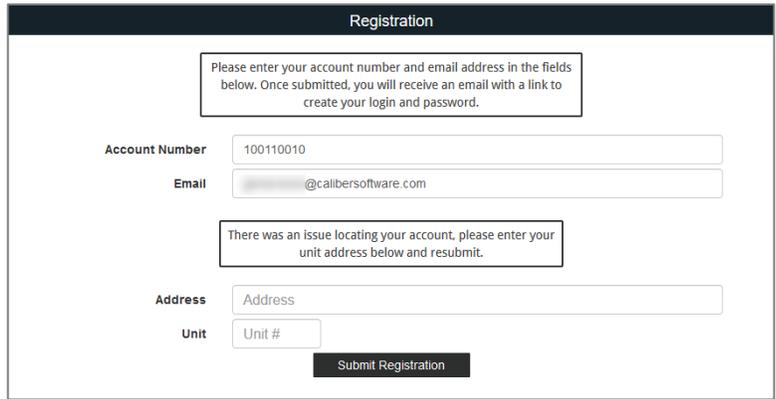
Registration

Please enter your account number and email address in the fields below. Once submitted, you will receive an email with a link to create your login and password.

Account Number: 100110010

Email: _____@calibersoftware.com

There was an issue locating your account, please enter your unit address below and resubmit.
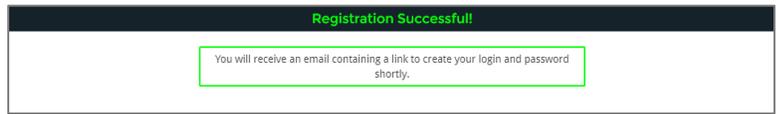
Address: Address

Unit: Unit #

Submit Registration

Registration Successful!

You will receive an email containing a link to create your login and password shortly.

Thank you for registering with Caliber Portal. In order to complete the process, you must click the following link:

If you did not register a new Caliber Portal account, you can simply disregard this message. If you have any questions, please contact your management company or property manager.

Create Login Credentials

1. Enter a **Username** of your choice. Usernames must be at least six (6) characters.
2. Enter a **Password** of your choice. Passwords must be at least eight (8) characters and contain at least one (1) uppercase letter, one (1) lowercase letter, and one (1) number.
3. **Confirm** Password.
4. Click **Submit**.
5. If that username is already in use, you will be required to enter another username until you enter one that is available.
11. A confirmation message will appear stating, **"Credential Creation Successful! Registration success! You will be redirected to the login page"**.

Create login credentials

Please enter your new username and password for your account.
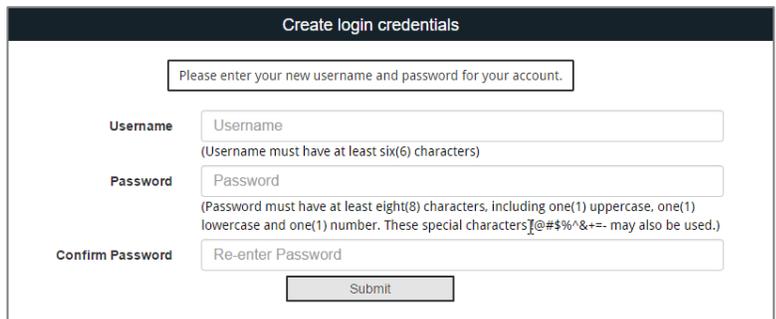
Username: Username
(Username must have at least six(6) characters)

Password: Password
(Password must have at least eight(8) characters, including one(1) uppercase, one(1) lowercase and one(1) number. These special characters !@#$%^&+=- may also be used.)

Confirm Password: Re-enter Password

Submit
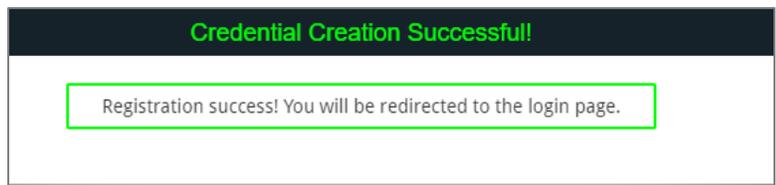
Credential Creation Successful!

Registration success! You will be redirected to the login page.

Logging in to Caliber Portal

Residents must login to their account on Caliber Portal in order to access FRONTSTEPS Pay.

> **!** The resident must have each of the required items below to login to their account on Caliber Portal.
> If they do not know what these items are, they must click on **Forgot Username/Password** to recover their credentials.

Required Items:

- **Internet Connection**
- **URL Link to their community portal, aka Caliber Portal** (provided by their Management Company)
- **Username** (created by the resident when they registered for Caliber Portal)
- **Password** (created by the resident when they registered for Caliber Portal)

Login Screen

1. Navigate to your **community portal** in any internet browser.
2. Enter your **Username**.
3. Enter your **Password**.
4. Click **Login**.
5. You will be taken to the home page of your community portal.

Making a Payment using FRONTSTEPS Pay

Once the resident is logged in to Caliber Portal, they can make a one-time payment, schedule a payment, etc., using FRONTSTEPS Pay.

If this is their first time making a payment using FRONTSTEPS Pay, they will begin by adding their first payment method.

Add First Payment Method

Required Items:

- **Resident must be logged in to community portal and on the Home screen.**
- **Payment method information:**
    - **For Credit/Debit: Card Number, Expiration Date (MM/YY), CVC**
    - **For ACH (eCheck): Routing Number, Account Number**
- **Billing Information: Name, Address, City, State, Zip**

1. Once logged in to your community portal, click **Make a Payment** (the yellow button under Balance).
2. Select a **Payment Type**: Credit/Debit (currently VISA and Mastercard) or ACH (eCheck).
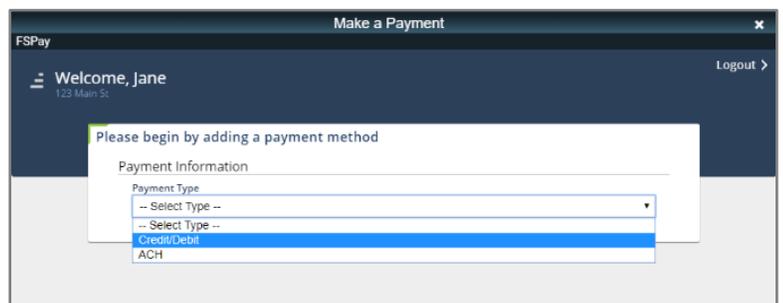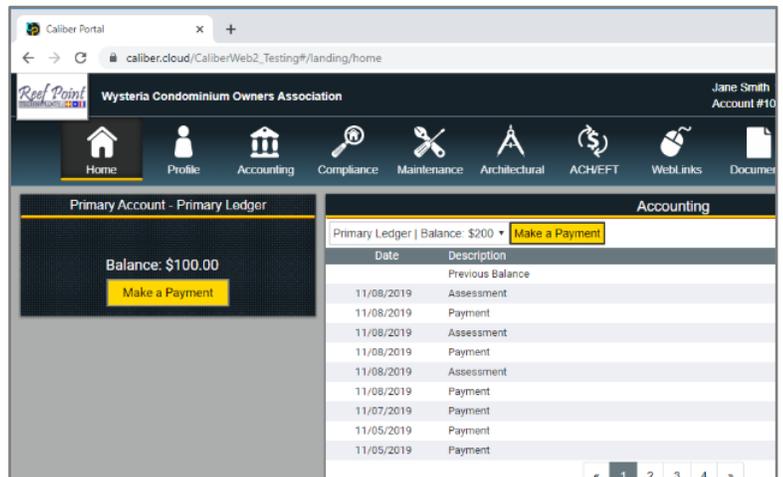
3. Enter your Payment Information.
   - For Credit/Debit: **Card Number**, **Expiration Date** (MM/YY), and **CVC**.
   - For ACH (eCheck): **Routing Number** and **Account Number**.
4. For Credit/Debit, enter your Billing Information: **Name on Card**, **Address**, **City**, **State**, and **Zip**.
5. Click **Submit**.
6. Click **Done** to return to the Payments Dashboard.
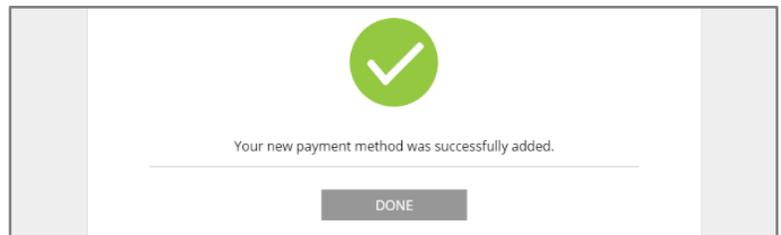
Make a One-Time Payment

1. Once logged in to your community portal, click **Make a Payment** (the yellow button under Balance).
2. Select **Amount Due** or **Other Amount**. If selecting Other Amount, enter the amount you want to pay.
3. Select a **Payment Date**. Click the calendar icon (🗓) to easily scroll to a future date.
4. Enter a **Memo**. This will appear on your email receipt and on your Transaction History.
5. Select a **Payment Method** or **Add Payment Method**.

6. Click **Submit**.
7. Click **Yes, Submit** to confirm your payment.
8. To set up this payment in AutoPay, click **Schedule It Now** and continue to **#9 below**.

   If you do not want to enroll in AutoPay, click **Done** to return to the Payments Dashboard. You will receive an email confirming your payment.
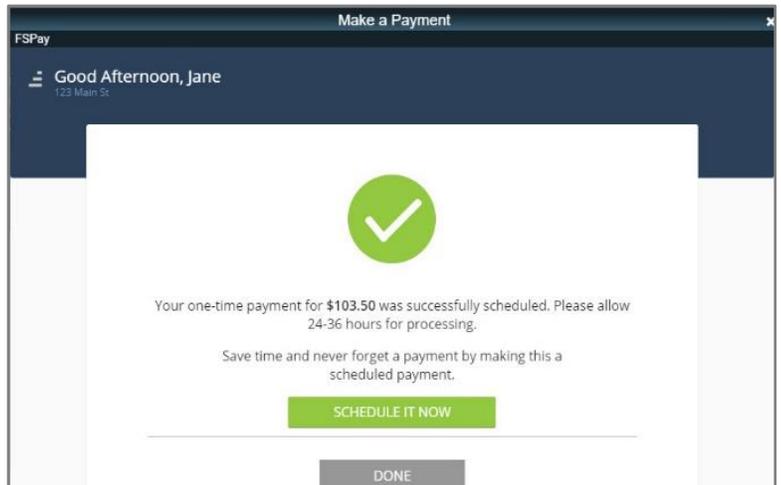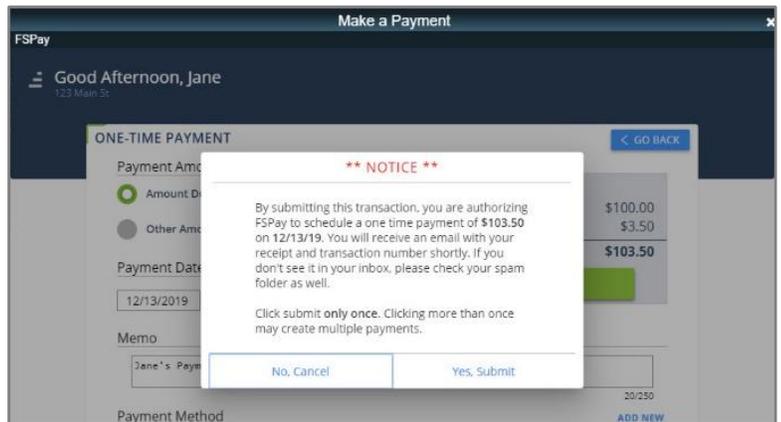
Turn a One-Time Payment into a Scheduled Payment (AutoPay)

9. Select a **Frequency** (Monthly, Quarterly, SemiAnnually, or Annually).
10. Select a **Day of the Month**.
11. Select a **Type of Payment**
12. Enter the payment **Amount**.
13. Enter a **Memo**.
14. Select a **Payment Method** or **Add New**.
15. Click **Submit**.
16. Click **Done** to return to the Payments Dashboard.
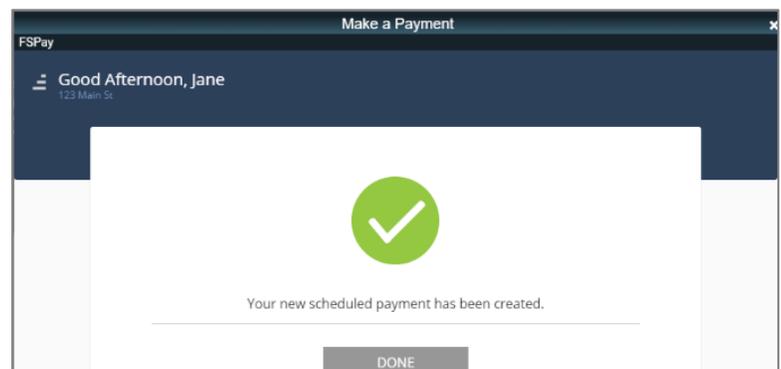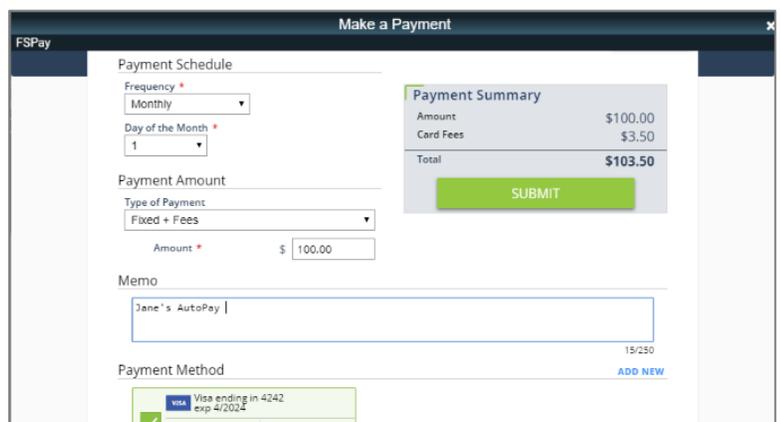
Add, Edit, or Delete a Scheduled Payment (AutoPay)

1. Under Scheduled Payments, click **Add New**.
2. Select a **Frequency** (Monthly, Quarterly, SemiAnnually, or Annually).
3. Select a **Day of the Month**.
4. Select a **Type of Payment**.
5. Enter the payment **Amount.**
6. Enter a **Memo**. This will appear on your email receipt and on your Transaction History.
7. Select a **Payment Method** or **Add New**.
8. Click **Submit**.
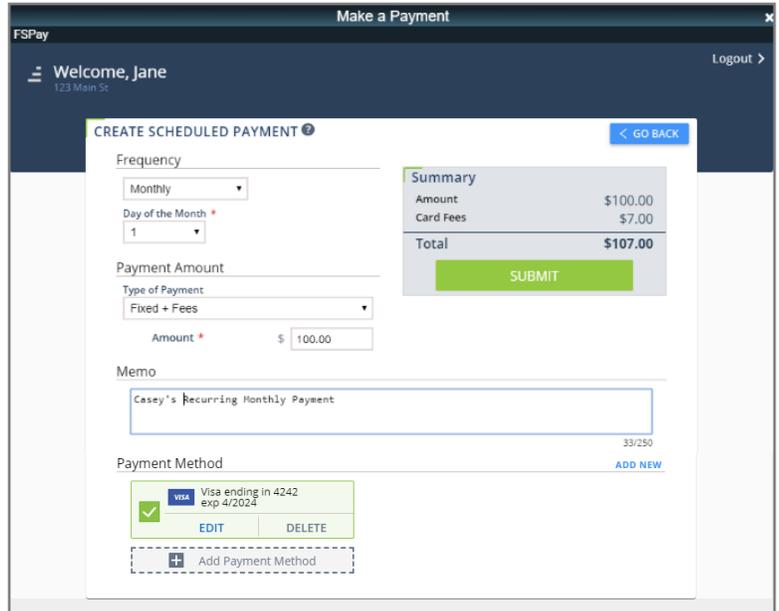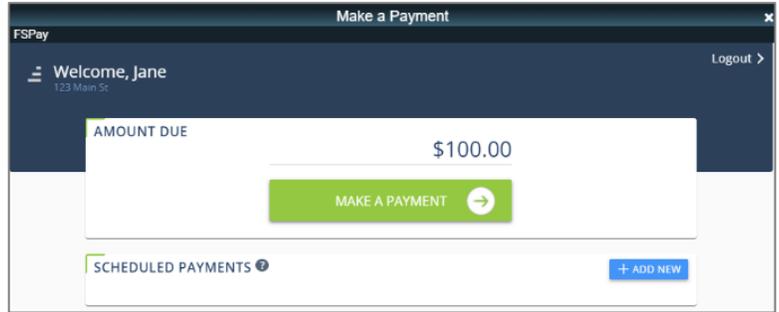
Active/Inactive Scheduled Payments (AutoPay)

1. Under Scheduled Payments, click the **Active/Inactive** toggle to activate or disable a scheduled payment.

   Scheduled payments set to **Active** pay on your balance automatically, based on the payment settings you define when adding a new scheduled payment.
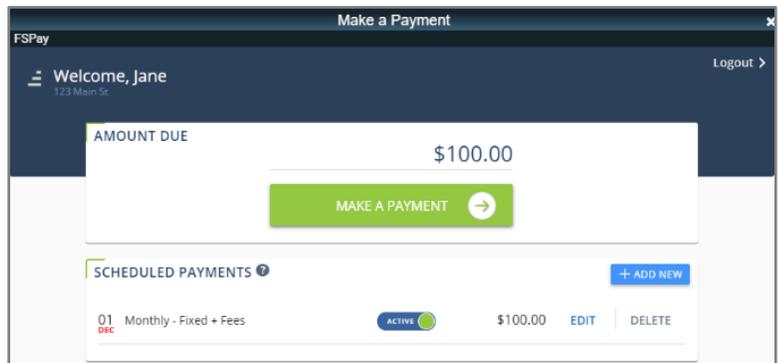
Scheduled payments set to **Inactive** are disabled and do not automatically pay on your balance. Use Inactive when you want to temporarily suspend your scheduled payment but save your payment settings to use again later.

View Recent Transactions

1. Under Recent Transactions, click **View All**.
2. Click **<< Previous** and **Next >>** to navigate the pages of your Transaction History.
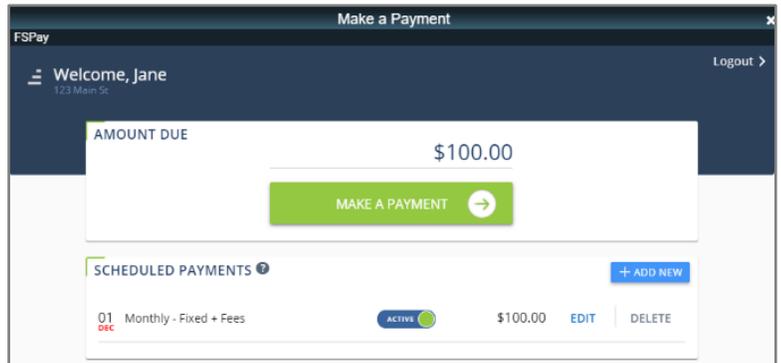
Cancel a Pending Payment

Only PENDING payments may be cancelled.

1. Under Recent Transactions, click **Cancel** next to the pending payment**.**
2. Click anywhere on the main window to return to the Payments Dashboard.
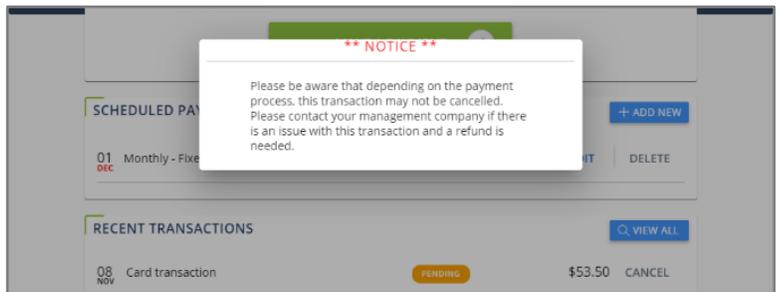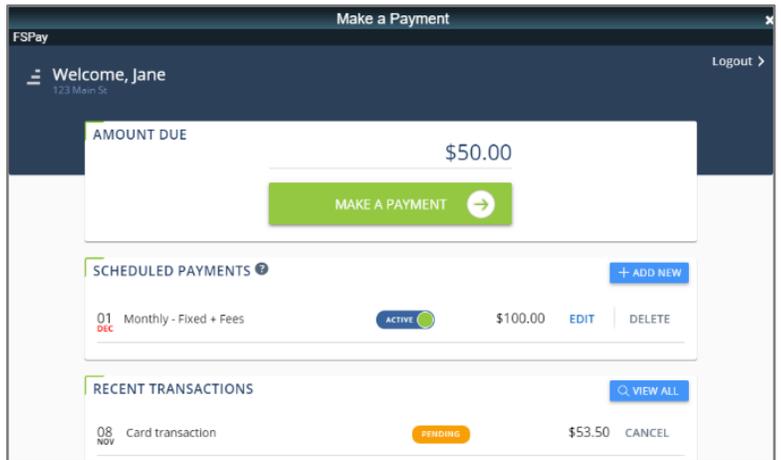
Recovering Your Caliber Portal Username/Password

If the resident is having trouble logging in to Caliber Portal, they can reset their username/password and try again. They will perform this task from the Caliber Portal login screen.

If they are still unable to login after following these steps, the resident must contact their Management Company for assistance before they can continue.

> **!** Residents have three (3) different options to reset their credentials. They must have the required items below for the option they choose in order to successfully reset their username/password.

Required Items:

- **Internet Connection**
- **URL Link to their community portal, aka Caliber Portal** (provided by their Management Company)

Option 1: Password reset by account number and email.

- **Account Number** (provided by their Management Company)
- **Email Address** (ability to login to their email account to retrieve email messages)

Option 2: Password reset by username only.

- **Username** (created by the resident when they registered for Caliber Portal)
- **Email Address** (ability to login to their email account to retrieve email messages)

Option 3: Username recovery by account number and email.

- **Account Number** (provided by their Management Company)
- **Email Address** (ability to login to their email account to retrieve email messages)

Forgot Username/Password

1. Navigate to your **community portal** in any internet browser.
2. Click **Forgot Username/Password.**
3. Select an option to reset/recover your credentials.
4. Follow the steps under the appropriate option below to continue.
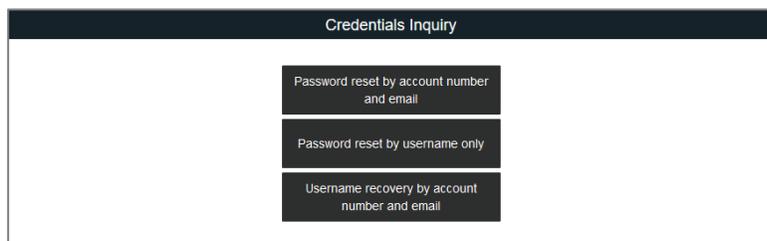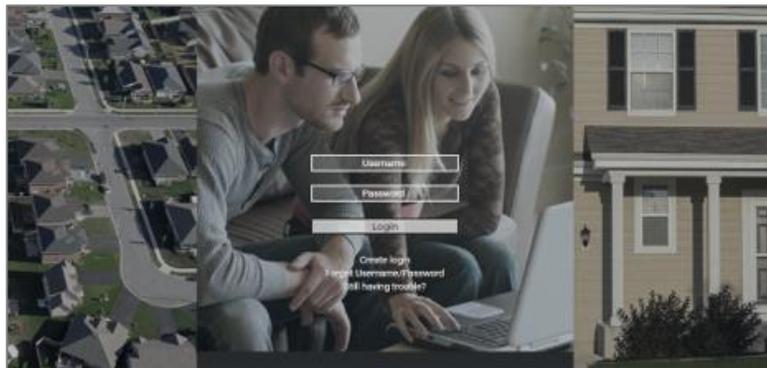
Option 1: Password Reset by Account Number and Email

1. Enter your **Account Number**.
2. Enter your **Email** associated with your account.
3. Click **Reset my password**.

   If you do not enter the correct Account Number or Email associated with your account, a message will appear stating, **"Account could not be found with the provided account number and email address".**
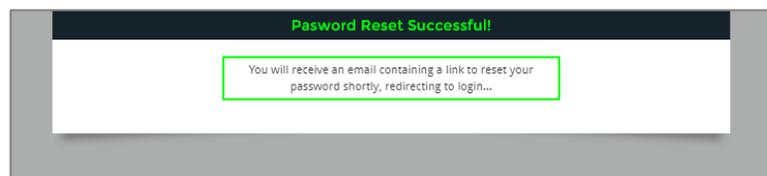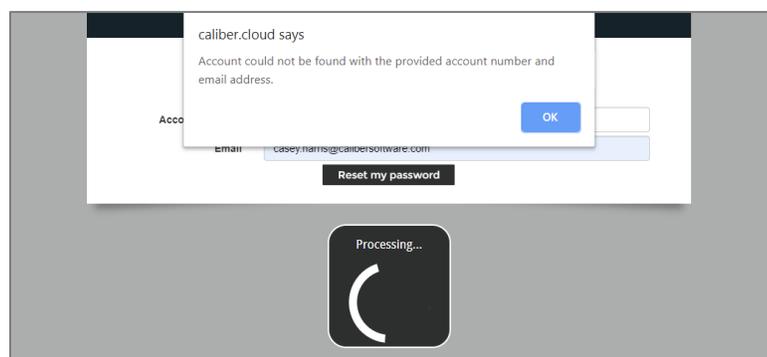
> ! If you are unable to enter the **correct information associated** with your account, **contact your Management Company for assistance**.

4. With the correct information entered, a confirmation message will appear stating, **"You will receive an email containing a link to reset your password"**.

5. Navigate to your Email Inbox.
6. Open the email from *alert@calibersoftware.email* and click on the link to reset your password.
7. Enter a **New Password**. Passwords must be at least eight (8) characters and contain at least one (1) uppercase letter, one (1) lowercase letter, and one (1) number.
8. **Confirm** the new password.
9. Click **Submit.**
10. A confirmation message will appear and you will be redirected to the login screen.
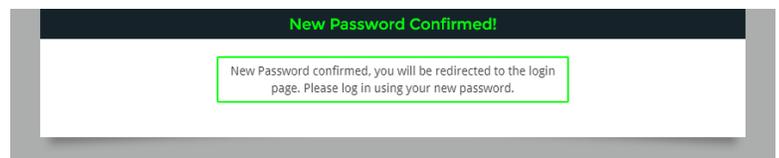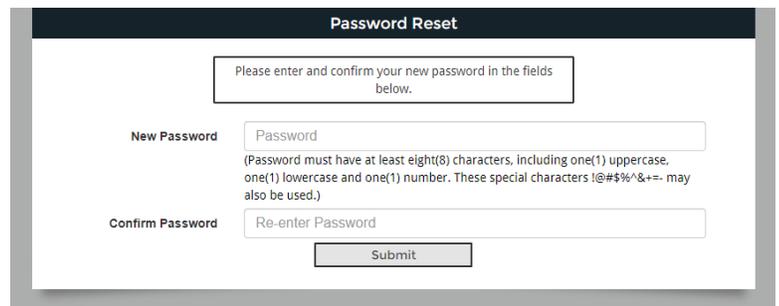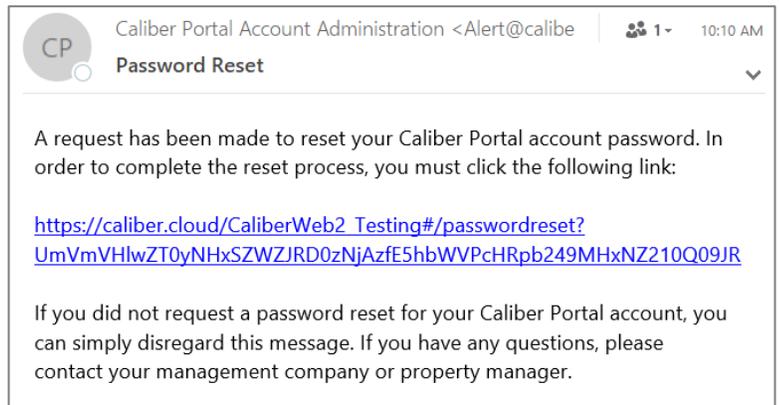
Option 2: Password Reset by Username only

1. Enter your **Username**.
2. Click **Reset my password**.

   If you do not enter the correct Username associated with your account, a message will appear stating, **"Account could not be found with the provided username".**

   ! If you are unable to enter the **correct information associated** with your account, **contact your Management Company for assistance**.
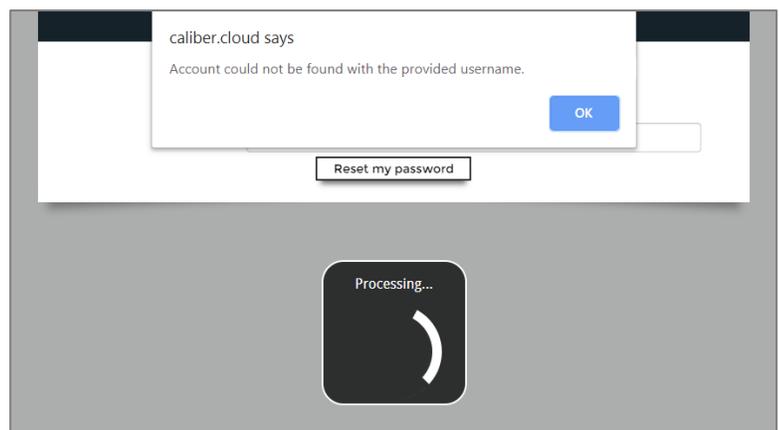
3. With the correct Username entered, a confirmation message will appear stating, **"You will receive an email containing a link to reset your password".**

4. Navigate to your Email Inbox.
5. Open the email from *alert@calibersoftware.email* and click on the link to reset your password.
6. Enter a **New Password**. Passwords must be at least eight (8) characters and contain at least one (1) uppercase letter, one (1) lowercase letter, and one (1) number.
7. **Confirm** the new password.
8. Click **Submit.**
9. A confirmation message will appear and you will be redirected to the login screen.
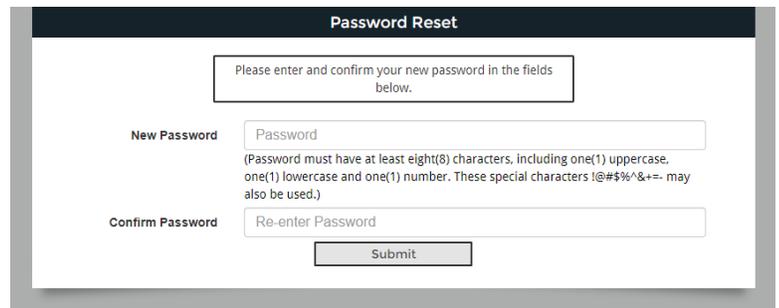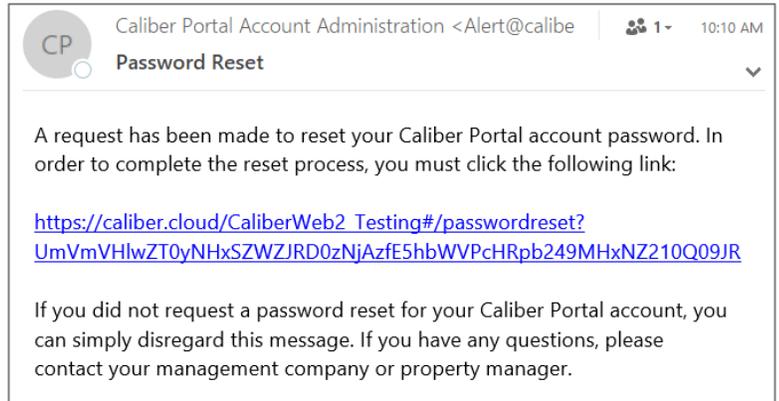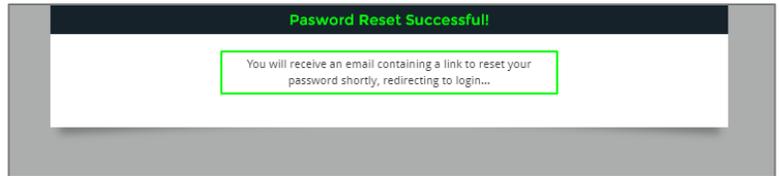
Option 3: Username Recovery by Account Number and Email

1. Enter your **Account Number**.
2. Enter your **Email** associated with your account.

   If you do not enter the correct Account Number and Email associated with your account, a message will appear stating, **"Username could not be found"**.

! If you are unable to enter the correct information associated with your account, **contact your Management Company for assistance.**

3. With the correct information entered, a confirmation message will appear stating, **"You will receive an email containing your username".**
4. Navigate to your Email Inbox.
5. Open the email from *alert@calibersoftware.email* to view your Username.
6. Return to the Caliber Portal login screen to login.

Username Recovery Successful!

Your will receive an email containing a your username, redirecting to login...

CP   Caliber Portal Account Administration <Alert@calibe   👥 1▾   10:33 AM

Username Recovery ⌄

A request has been made to recover your Caliber Portal account username. Your username is:

Casey2

If you did not request a username recovery for your Caliber Portal account, you should contact your management company or property manager immediately.

Frequently Asked Questions

What is FRONTSTEPS Pay?

FRONTSTEPS Pay is a modern payment platform that has been purpose-built to meet the specific needs of our clients, including automatically posting online payments to homeowner ledgers, simplified recurring payments, and a single-login user experience.

Who is FRONTSTEPS?

FRONTSTEPS is the parent company to Caliber Software, AtHomeNet, AssociationVoice, Evercondo, DwellingLive, and PatrolLive. We are dedicated to providing solutions for all types of communities, from single-family homes to high-rise buildings.

Why use FRONTSTEPS Pay?

FRONTSTEPS Pay is a secure, single-login payment experience that makes it easy for residents to pay from any device and view their online payments instantly.

What payment methods work with FRONTSTEPS Pay?

You can pay with ACH (eCheck), Credit, and Debit (VISA and Mastercard – not AMEX at this time, but it is in future development).

How do I sign up for FRONTSTEPS Pay?

There is no additional sign up once your community enables FRONTSTEPS Pay.

Do I need to do anything when my community switches to FRONTSTEPS Pay?

You will need to add your preferred payment method. If you used autopay before the switch to FRONTSTEPS Pay, you will need to add your recurring payment (Scheduled Payments).

What is the URL for logging in to make a payment?

You access FRONTSTEPS Pay by logging in to your community portal and clicking Make a Payment.

How do I make a payment?

Log in to your community portal and click Make a Payment.

Can I set up recurring payments or AutoPay?

Yes, you can set up recurring ACH payments and recurring Credit/Debit payments.

Can I edit or modify a recurring payment or AutoPay settings?

Yes, you can easily edit recurring payment information by logging in to your community portal and clicking Make a Payment. Under Scheduled Payments, click Edit on the recurring payment you wish to update.

How can I find my recent transactions?

Log in to your community portal and click Make a Payment. Under Recent Transactions, click View All.

How long does it take for my balance to update after I make a payment?

Your balance updates instantly after making a payment.

How can I find a payment that I made using FRONTSTEPS Pay on my credit card statement?

"FS PAY" will appear in the transaction description on the credit card statement.

How do I cancel a pending payment?

Log in to your community portal and click Make a Payment. Under Recent Transactions, click Cancel on the payment you wish to cancel. Only payments with a Pending status may be canceled.

Does Caliber have a Personal Identifying Policy (PII) for storing sensitive homeowner payment information?

Caliber is <u>NOT</u> storing any Personally Identifying Information (PII) through FSPay. FSPay uses advanced encryption to process payments so that sensitive homeowner data is never shared or stored on our platform.

A customer says that their homeowners cannot submit a payment method or part of the screen is cut off. How can they continue?

This can occur with homeowners using a Mac OS device (iPhone, iPad, MacBook, etc.). Safari does not display scroll bars by default. The homeowner must start scrolling with their mousepad or finger to make the scroll bars appear. We have placed a message at the bottom of the window instructing homeowners to "Scroll Down to Submit".

A customer is receiving an error message that states, "This webpage might be temporarily down or may have moved permanently to a new web address". It may appear as the screenshot below:

This customer may be blocked by a firewall or may be in a country that is not supported by FSPay.

If they are in supported country, their firewall may be blocking the FSPay web address. This can be solved by connecting to a different WiFi/internet network.

If they are using a mobile device, ask them to connect to a different WiFi network and launch FSPay again.

If they are unable to connect to a different WiFi network, ask them to turn off their WiFi connection so that they are using cellular data only (if they have a data plan from their mobile provider), and try to launch FSPay again.

If they are unable to switch to another WiFi network or if they are on a desktop computer that cannot switch networks, ask the customer to make their payment at a later time from another device/network.

Countries that do not have access to FSPay (subject to change):

Afghanistan	*Bangladesh*	*Burma*	*Cuba*
Ghana	*Haiti*	*Iran*	*Iraq*
Lebanon	*Liberia*	*Libya*	*Pakistan*
Sudan	*Syria*	*Turkey*	*Liberia*
Libya			