Announcement: WEB-SITE ACCESS for HOA BOARD MEMBERS!

Beven & Brock is pleased to introduce some new enhancements to your access as a board member to your financial information through the Beven & Brock web-site.   You now have on-demand access 24-7 to the reports that you have been receiving once a month.   In the process of this change, we have made some minor adjustments to your access.   Your password remains the same, however, there are some new features that you need be aware of.

You are currently set up as a "Board Member".   When you log-in, click on "Reports" in the left column. You will then be able to navigate through the reports.   There is a tutorial document available to you on our site, that will provide information as to how to navigate through the different reports.   (See below)

All of the reports are financial, except one called "Directory".   This is a report that is constantly being updated, either by our staff, or your owners, who can directly update their contact information, and other important pieces of information. In the near future, we will be sending an invitation to all owners to register for the portal. Once you see the directory, and understand that having current information on your owners, you may want to encourage owners to register.

The new owner portal, called "Condo Café" will eventually replace SenEarthCo. Condo Café' is much more compatible with our base software program. We are nearing the end of a major software transition, and we are grateful for your patience with the changes.

See below for pertinent screenshots and links:

 Begin by going to www.bevenandbrock.com.   Go to "Board Member" and click on the first drop-down.
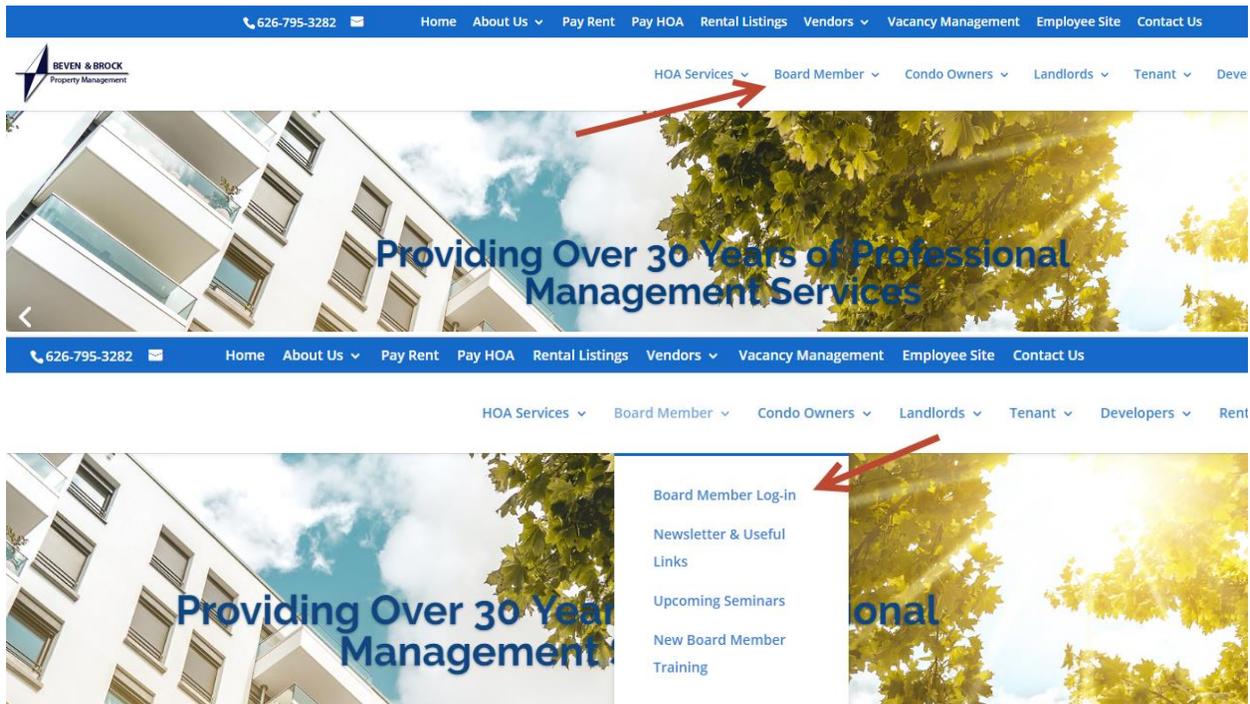
Be sure to read the section above this line titled: Welcome to the Board Member Portal first.

The links below aren't live, as this is a screenshot.   For the live links, go to the website, per screen shot above.

There are two types of board member access: 1) Board approvers and 2) View & Print only.

Board approvers have access to approve current payables.   Access for board approvers can be done via a computer, or phone app. Training is provided by following the link below in #2.

The board viewer role is available to any other current board member who would like the ability to view current reports.   The "view only" status **does** allow for downloading and printing.

Help email for support

See below for instructions as to how to access reports.

1. You may have received an email with your first time log-in information. If you did not, or have any difficulty, you may email "Help@bevenandbrock.com."

Training for board approvers

2. Training for "Board approvers": http://www.bevenandbrock.com/invoice-approval/
Two short video tutorials are available, along with a PDF of screen shot instructions.
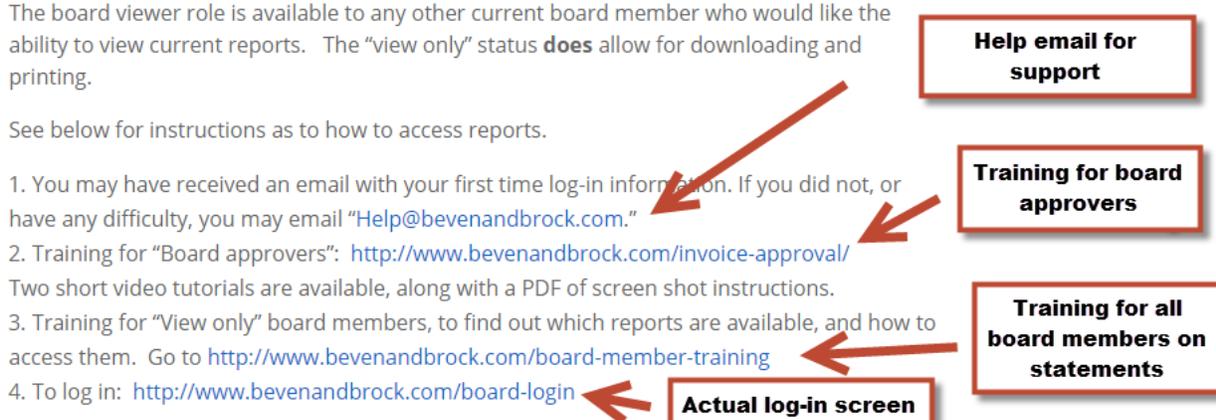3. Training for "View only" board members, to find out which reports are available, and how to access them. Go to http://www.bevenandbrock.com/board-member-training

Training for all board members on statements

4. To log in: http://www.bevenandbrock.com/board-login

Actual log-in screen

See the next page for your first time log in credentials and information on the available reports.

BOARD MEMBER REPORTS ACCESS -STEP BY STEP!

Server: 166

YARDI VOYAGER ˢ

approver@yardi.com

Password

Condo Live

Forgot Password?

For information regarding your login, please contact your system administrator
help@bevenandbrock.com

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First Line: Your email address

Second Line: **Welcome123!** (first time only-system will require a change, your new password must be 10 characters, with one symbol and one capital letter)

Third Line: Condo Live-do not change

Reports

shows Income Statement, Budget Comparison, Budget Comparison (with PTD), Budget with Last Year, Annual Statement, 12 Month Cash Flow

Financial Report

▸ Roles
▸ Reports
▸ Admin

Property   6623
Book   cash

Financial Analytics
Aged Receivable
Receivable Detail by Charge Code
Check Detail
Invoice Image Export
Balance Sheet
Directory

SUBGROUP3
SUBGROUP4

owners with unpaid charges

what types of charges owners have paid

information about checks that have been issued to vendors

shows invoices and where they are in process invoices

contact information for owners and tenants

a quick view of funds in all of your association's bank accounts

Show Property Name   Suppress Zer
cct. Code   Budget

For additional information about various financial reports please see
http://www.bevenandbrock.com/financialstatementhelp.pdf

Financial Analytics-income statement, budget comparison, budget with last year, annual statement, and 12 month cash flow
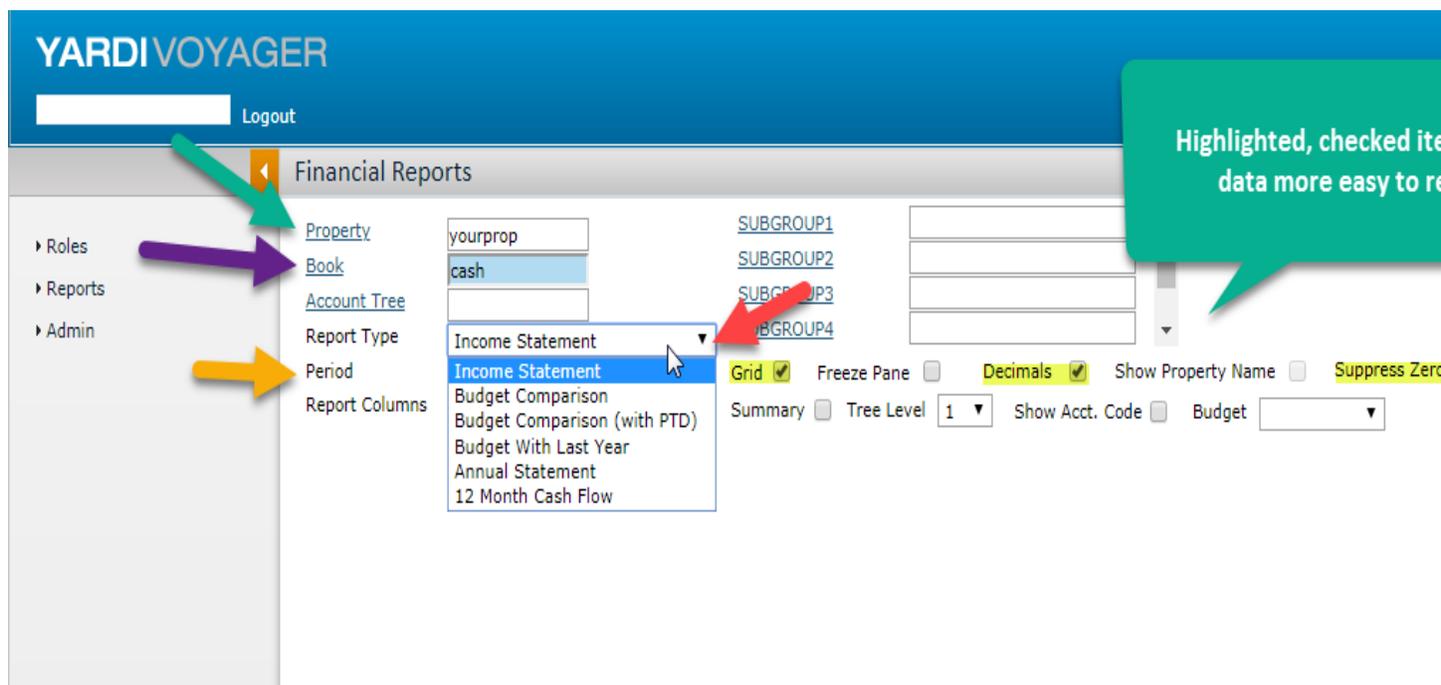
There are six reports available in the Financial Analytics area. To access Financial Analytics various reports:

1. click Property, select your property

2. click Book, select cash

3. click drop down menu for Report Type, select desired report

4. enter desired time frame for Period

Helpful additional selections: check grid, decimals, and suppress zero. You can also export the report to a PDF or Excel. When reviewing budget comparison data please utilize the budget comparison report **without PTD**, as it reflects year to date information.

5. click display to show the report

Aged Receivable-owners with unpaid charges

To access the Aged Receivable:

1. click property, select your property

2. click status drop down menu, select current

3. select a date for the Transactions through and Age as of fields

4. select Report Summary By owner from the drop down menu

5. set Exclude Units? and Group By Master Units? to no

6. select desired destination from the drop down menu

7. click Submit to show the report

Receivable Detail by Charge Code-what types of charges owners have paid
and what are outstanding

To access the Receivable Detail by Charge Code:

1. click property, select your property

2. click status drop down menu, select current

3. enter the time frame you would like to review in the mm/yy fields

4. select desired destination from the drop down menu

Helpful additional selections: select a specific unit or owner by clicking on those underlined blue words or select a charge code for a particular charge like dues, special assessment, or fines by clicking on that field

5. click Submit to show the report

Check Detail-information about checks that have been issued to vendors

To access the Check Detail:

1. click property, select your property

2. click bank, select the bank account you wish to review

3. enter the time frame you would like to review in the mm/yy fields

4. click the All Checks and Include Voids drop down menus, select the desired choice

5. select desired destination from the drop down menu

6. click Submit to show the report

Helpful additional selections: Once the report is on screen, clicking on the blue payable number will lead to the payable invoice. The payable invoice shows vendor information, payment status, and under the images tab, a scanned picture of the invoice from the vendor can be reviewed.

Invoice Image Export -invoices and where they are in processing as well as images of invoices

To access the Invoice Image Export:

1. click property, select your property

2. enter the time frame you would like to review in the Post Month or Inv. Date fields (optional)

3. click the order drop down menu, select Descending

4. click Display

Helpful additional selections: Once the report is on screen clicking on the blue Ctrl. No. number will lead to the invoice register. The invoice register shows vendor information, payment status, and under the images tab, a scanned picture of the invoice from the vendor can be reviewed.

Balance Sheet-a quick view of funds in all of your association's bank accounts

To access the Balance Sheet:

1. click property, select your property

2. enter the month you would like to review in the Month field

3. click the Consolidated? drop down menu, select no

4. enter 0 in the Books field

5. enter ysi_bs in the Account Tree field

6. click the Rounding and Show GL account codes? drop down menus, select no

7. select desired Destination from the drop down menu

8. click Submit to show the report

Directory-contact information for owners and tenants

To access the Directory:

1. click property, select your property

2. click the Status drop down menu, select current to review current owners

3. click the Sort By drop down menu, select Unit to display by unit order or Owner to sort by owner's last name

4. click Submit to display the report

Helpful additional selections: To review just one particular unit, click Unit, select the desired unit from list, and click ok.