



# Client Connect Portal – Owner View

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## Overview

Westwind Management Group, LLC provides owners of communities we manage with a portal for accessing information related to their property and account. There are many exciting features including: account balances, upcoming dues, news, calendar, documents, work order history, architectural, compliance and much more!

## Login Page

A screenshot of the Client Connect Portal login page. On the left is a "Login - Resident" sidebar with a "Login" tab and a "Help" tab. The "Login" tab is active, showing a "User:" field with the email "Jesse@westwindmanagement.com", a "Password:" field with masked characters, and a blue "Login" button. Below the password field is a "Forgot Password?" link. The main content area features the Westwind logo at the top, a large scenic image of snow-capped mountains and yellow trees, and a blue banner with the text "Welcome to Your Community Portal – Client Connect". Below this, instructions state: "Please log in using your **account number or email address and password.** Once logged in, please visit the **Help Panel** to learn more about your Client Connect portal." At the bottom, there is a row of five small images: a group of people on bicycles, a woman jogging, two women talking, a child playing soccer, and a dog lying down.

## Accessing

To access the login page, first navigate to the Westwind Management Group home page at [www.westwindmanagement.com](http://www.westwindmanagement.com). Click either the Homeowner Login link on the top-right of the page, or click Homeowner Resources and choose your community from the listing.

## Login Tab

### Established Account

You can now login to your account using your email address or account number. Simply enter your account number or email address in the User field and enter your password in the Password field.



## Forgot Password

If you have not established an account login, or do not remember your password, but you do know your account number and email address on file, please click the forgot password link. You will be prompted to enter your account number and email address and a link will be sent to you. Once you receive the link, click to access the portal and ensure you update your password by clicking User Profile under the Public > Application tab. Once your User Profile opens on the Dashboard, click Password. You will be prompted to enter your new password and click Change to update.

## Help Tab

The Help tab allows you to submit a form to our Client Care Representative for help with establishing an account or asking a general question. You will need to fill out the form and choose Email To: Service, provide your name, email address and an overview of the request in the Question field. We will contact you within one business day to help facilitate your request.

## User Panel

Groups, Applications, links, and summary information is all contained on the User Panel which is the left half of the screen. There is a divider between the Dashboard and the User Panel that can be dragged left or right to resize the User Panel.

## Dashboard

To the right of the User Panel is a Dashboard. The Dashboard is where applications open. Multiple tabs can be opened simultaneously and switched between by clicking the tab to make it active.

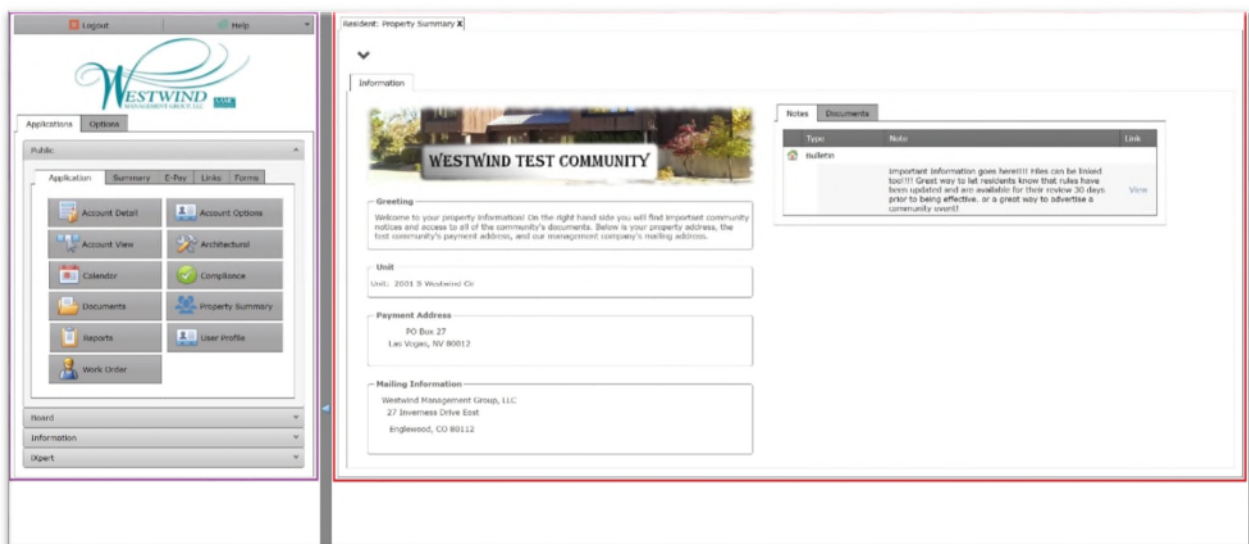


Figure 1 - User Panel in Purple, Dashboard in Red



## User Panel Actions

### Logout

To log out of the portal, click the Logout button on the top left of the screen. Logging out saves your Dashboard and settings.

### Help

The Help application contains a comprehensive help file that opens in the Dashboard. It is fully searchable index of all the applications and features of the site including definitions.

### Options Tab

Settings such as Auto Collapse, logout behavior, and Themes can be saved using the Options tab. Auto Collapse automatically closes inactive Groups when another Group is selected. Close Tabs at Logout closes all Applications open in the Dashboard upon logout. Themes change the color scheme of the portal.

### Applications Tab

All Groups, Applications, and additional links or summary views are contained in the Applications tab.

## Applications and Groups

### Public Group

All users have access to the Public Group. There are many Applications which include Account Detail, Account Options, Account View, Architectural, Calendar, Compliance, Documents, Property Summary, Reports, User Profile, and Work Order. Each of these open a new tab in the Dashboard.





Additional tabs within the Public Group include: Summary which is an overview of your unit, dues, payment address, and account status, E-Pay which allows you to make a one-time payment or create a recurring payment, Links which are a collection of links pertinent to your community, and Forms which allow you to submit requests as web forms.

### **Information Group**

Information contains two tabs, Notes and Documents. Notes displays News Bulletins while Documents displays Featured Documents for your community.

### **iXpert Group**

FAQs are now found in iXpert search. Opening the iXpert Group and searching any term found in the FAQ will return all the items that contain the searched term.